

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

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For calendar year 2023, or tax year beginning 04-01-2023, and ending 03-31-2024

Name of foundation HIMAN BROWN CHARITABLE TRUST
A Employer identification number 27-6669056
B Telephone number (see instructions) (212) 326-0844
C If exemption application is pending, check here
D 1. Foreign organizations, check here.....
2. Foreign organizations meeting the 85% test, check here and attach computation ...
E If private foundation status was terminated under section 507(b)(1)(A), check here .....
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .....
H Check type of organization: Section 501(c)(3) exempt private foundation
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 99,455,956
J Accounting method: Cash Accrual Other (specify)
(Part I, column (d) must be on cash basis.)

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 Revenue (1-12) and Operating and Administrative Expenses (13-26), followed by summary rows 27-29.

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 . . . . .		768,749	364,055	364,055
	2	Savings and temporary cash investments . . . . .		2,167,201	4,339,528	4,339,528
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	5	Grants receivable . . . . .				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use . . . . .				
	9	Prepaid expenses and deferred charges . . . . .				
	10a	Investments—U.S. and state government obligations (attach schedule)		770,807	816,099	775,371
	b	Investments—corporate stock (attach schedule)		48,413,048	47,634,344	70,449,313
	c	Investments—corporate bonds (attach schedule)		10,569,953	8,622,112	8,463,618
	11	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans . . . . .				
	13	Investments—other (attach schedule) . . . . .		15,544,153	15,442,605	15,064,071
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)					
16	<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)		78,233,911	77,218,743	99,455,956	
Liabilities	17	Accounts payable and accrued expenses . . . . .		470		
	18	Grants payable . . . . .				
	19	Deferred revenue. . . . .				
	20	Loans from officers, directors, trustees, and other disqualified persons . . . . .				
	21	Mortgages and other notes payable (attach schedule) . . . . .				
	22	Other liabilities (describe ▶ _____)		0	2,131	
	23	<b>Total liabilities</b> (add lines 17 through 22).		470	2,131	
Net Assets or Fund Balances	<b>Foundations that follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>					
	24	Net assets without donor restrictions . . . . .				
	25	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>					
	26	Capital stock, trust principal, or current funds . . . . .		0	0	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .		0	0	
28	Retained earnings, accumulated income, endowment, or other funds . . . . .		78,233,441	77,216,612		
29	<b>Total net assets or fund balances</b> (see instructions) . . . . .		78,233,441	77,216,612		
30	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .		78,233,911	77,218,743		

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	78,233,441
2	Enter amount from Part I, line 27a . . . . .	2	-1,016,829
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	77,216,612
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	77,216,612

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include FIDELTY 223, FIDELTY 551, FIDELTY 563, MORGAN STANLEY 655, MORGAN STANLEY 703, OPPENHEIMER G24, COST BASIS ADJUSTMENT, GOLUB K-1, and CAPITAL GAINS DIVIDENDS.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss) plus (f) minus (g). Rows a-e show sales prices from 771,305 to 2,000,000 and resulting gains/losses.

Table with 4 columns: (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), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)).

Summary rows for capital gain net income (line 2) and net short-term capital gain or loss (line 3).

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

Table for excise tax calculation with 11 rows. Includes exemptions (1a), tax under section 511 (2), subtitle A tax (4), tax based on investment income (5), credits/payments (6a-6d), total credits (7), penalty (8), tax due (9), overpayment (10), and amount to be credited (11).

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?
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.
c Did the foundation file Form 1120-POL for this year?
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?
If "Yes," attach a detailed description of the activities.
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?
b If "Yes," has it filed a tax return on Form 990-T for this year?
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.
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?
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV.
8a Enter the states to which the foundation reports or with which it is registered (see instructions)
NY
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? If "No," attach explanation
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. If "Yes," complete Part XIII
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.
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

Table with 3 columns: Question ID, Yes, No. Rows 1a-13.

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 ZIP+4 10036

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. If "Yes", enter the name of the foreign country

Table with 3 columns: Question ID, Yes, No. Rows 16.

**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 exempted acts, that were not corrected before the first day of the tax year beginning in 2023? . . . . .
- 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? . . . . .  
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 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.) . . . . .
- 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 2023?

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

**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 (section 4945(e))?
  - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
  - (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 described in section 4945(d)(4)(A)? See instructions
  - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
- 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
- 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?  
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?
- b** 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?

	Yes	No
<b>5a(1)</b>		No
<b>5a(2)</b>		No
<b>5a(3)</b>		No
<b>5a(4)</b>		No
<b>5a(5)</b>		No
<b>5b</b>		
<b>5d</b>		
<b>6a</b>		No
<b>6b</b>		No
<b>7a</b>		No
<b>7b</b>		
<b>8</b>		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
RICHARD L KAY PRYOR CASHMAN LLP 7 TIMES SQUARE NEW YORK, NY 10036	TRUSTEE 20.00	100,000	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
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".**

<b>(a)</b> Name and address of each person paid more than \$50,000	<b>(b)</b> Type of service	<b>(c)</b> Compensation
COHEN & GRESSER 800 3RD AVE NEW YORK, NY 10022	LEGAL REPRESENTATION	989,000
MICHAEL B KRAMER & ASSOC 488 MADISON AVE STE 1120 NEW YORK, NY 10022	LEGAL REPRESENTATION	329,109
CLARE LOCKE LLP 10 PRINCE ST ALEXANDRIA, VA 22314	LEGAL REPRESENTATION	197,001
MORGAN STANLEY 1585 BROADWAY NEW YORK, NY 10036	INVESTMENT ADVISORY	193,357
PRYOR CASHMAN 7 TIMES SQUARE NEW YORK, NY 10036	LEGAL REPRESENTATION	150,158

**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>	
All other program-related investments. See instructions.	
<b>3</b> 	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>	82,825,154
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	2,630,062
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	9,153,265
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	94,608,481
<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>	94,608,481
<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>	1,419,127
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3.. . . .	<b>5</b>	93,189,354
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	4,659,468

**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>	4,659,468
<b>2a</b>	Tax on investment income for 2022 from Part V, line 5. . . . .	<b>2a</b>	98,701
<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>	98,701
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	4,560,767
<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>	4,560,767
<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>	4,560,767

**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>	8,071,063
<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>	8,071,063

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

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
<b>1</b> Distributable amount for 2023 from Part X, line 7				4,560,767
<b>2</b> Undistributed income, if any, as of the end of 2022:				
<b>a</b> Enter amount for 2022 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 2018. . . . .	371,811			
<b>b</b> From 2019. . . . .	1,573,890			
<b>c</b> From 2020. . . . .	776,593			
<b>d</b> From 2021. . . . .	426,415			
<b>e</b> From 2022. . . . .	2,915,623			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	6,064,332			
<b>4</b> Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ <u>8,071,063</u>				
<b>a</b> Applied to 2022, 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 2023 distributable amount				4,560,767
<b>e</b> Remaining amount distributed out of corpus	3,510,296			
<b>5</b> Excess distributions carryover applied to 2023. (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	9,574,628			
<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 2022. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				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 2018 not applied on line 5 or line 7 (see instructions)	371,811			
<b>9</b> <b>Excess distributions carryover to 2024.</b> Subtract lines 7 and 8 from line 6a	9,202,817			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2019	1,573,890			
<b>b</b> Excess from 2020	776,593			
<b>c</b> Excess from 2021. . . . .	426,415			
<b>d</b> Excess from 2022	2,915,623			
<b>e</b> Excess from 2023	3,510,296			

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 . . . . .

Table with columns: Tax year (a) 2023, (b) 2022, (c) 2021, (d) 2020, (e) Total. Rows include 2a, 2b, 2c, 2d, 2e, 3a, 3b, 3c, 3d, 3e, 3f, 3g, 3h, 3i, 3j, 3k, 3l, 3m, 3n, 3o, 3p, 3q, 3r, 3s, 3t, 3u, 3v, 3w, 3x, 3y, 3z.

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> 92ND ST Y 1395 LEXINGTON AVENUE NEW YORK, NY 10128	N A	P C	EDUCATIONAL	1,100,000
ADRIENNE ARSHT CENTER FOUNDATION INC 1300 BISCAYNE BLVD MIAMI, FL 33132	N A	P C	GENERAL	100,000
ALZHEIMER'S FOUNDATION 225 N MICHIGAN AVE FLOOR 17 CHICAGO, IL 60601	N A	P C	GENERAL	50,000
ANTI-DEFAMATION LEAGUE 605 3RD AVE NEW YORK, NY 10158	N A	P C	GENERAL	100,000
BIG BROTHERS BIG SISTERS OF NYC 40 RECTOR STREET NEW YORK, NY 10006	N A	P C	GENERAL	20,000
BRANCHES INC 11500 NW 12TH AVENUE MIAMI, FL 33168	N A	P C	GENERAL	100,000
BREAD FOR THE CITY 1525 7TH ST NW WASHINGTON, DC 20001	N A	P C	GENERAL	25,000
BREAKTHROUGH MIAMI INC UNITED WAY ANSIN BUILDING 3250 SW 3RD AVE MIAMI, FL 33129	N A	P C	EDUCATIONAL	100,000
CARTER BURDEN NETWORK 415 EAST 73RD STREET NEW YORK, NY 10021	N A	P C	GENERAL	25,000
CENTRAL PARK CONSERVANCY INC 14 E 60TH ST FL 8 NEW YORK, NY 100227122	N A	P C	GENERAL	50,000
CENTRAL SYNAGOGUE 652 LEXINGTON AVENUE NEW YORK, NY 10022	N A	P C	GENERAL	50,000
COMMUNITIES IN SCHOOLS OF THE NATIONS CAPITAL INC 1023 31ST STREET NW SUITE 510 WASHINGTON, DC 20007	N A	P C	EDUCATIONAL	80,000
CORNELL UNIVERSITY 130 E SENECA STREET SUITE 400 ITHACA, NY 14850	N A	P C	GENERAL	587,000
CROHNS & COLITIS FOUNDATION 733 THIRD AVENUE STE 510 NEW YORK, NY 10017	N A	P C	GENERAL	25,000
CYCLE FOR SURVIVAL 633 THIRD AVE 5TH FLOOR NEW YORK, NY 10017	N A	P C	GENERAL	10,000
	N A	P C	GENERAL	15,000

DANCING DREAMS 211-47 26TH AVE QUEENS,NY 11360				
FOOD BANK FOR NEW YORK CITY 39 BROADWAY NEW YORK,NY 10006	N A	P C	GENERAL	25,000
FOUNDATION FOR NEW EDUCATIONAL INITIATIVES 1450 NE SECOND AVENUE SUITE 776 MIAMI,FL 33132	N A	P C	EDUCATIONAL	25,000
FUND FOR THE AGED (JEWISH HOME & HOSPITAL FOUNDATION) 120 W 106TH STREET NEW YORK,NY 10025	N A	P C	GENERAL	50,000
GLOBAL CAMPS AFRICA 700 12TH STREET SUITE 88 LYNCHBURG,VA 24504	N A	P C	GENERAL	25,000
GOD'S LOVE WE DELIVER 166 6TH AVE NEW YORK,NY 10013	N A	P C	GENERAL	276,500
GREATER MIAMI & SOUTH FLORIDA YOUTH AND COMMUNITY INC 3581 SW 68TH TER MIRAMAR,FL 330236021	N A	P C	GENERAL	40,000
GREATER MIAMI JEWISH FEDERATION 4200 BISCAYNE BLVD MIAMI,FL 33137	N A	P C	GENERAL	100,000
HARVESTING HOPE INC 204 CEDAR ST STE 102 CAMBRIDGE,MA 21613	N A	P C	GENERAL	5,000
HILLEL - THE FOUNDATION FOR JEWISH CAMPUS LIFE 800 EIGHTH STREET NW WASHINGTON,DC 20001	N A	P C	GENERAL	50,000
HILLEL AT CORNELL INC 130 E SENECA STREET SUITE 400 ITHACA,NY 14850	N A	P C	EDUCATIONAL	33,300
HORIZONS GREATER WASHINGTON INC 3000 CATHEDRAL AVE NW WASHINGTON,DC 20008	N A	P C	GENERAL	150,000
HUNTER COLLEGE FOUNDATION 695 PARK AVENUE ROOM 1601E NEW YORK,NY 100655024	N A	P C	EDUCATIONAL	50,000
INSTITUTE FOR JEWISH & COMMUNITY RESEARCH 3245 GEARY BLVD UNIT 591478 SAN FRANCISCO,CA 941593360	N A	P C	GENERAL	10,000
ISLAND HARVEST 15 GRUMMAN ROAD WEST SUITE 1450 BETHPAGE,NY 11714	N A	P C	GENERAL	40,000
KEY BISCAYNE COMMUNITY FOUNDATION 240 CRANDON BLVD 108 KEY BISCAYNE,FL 33149	N A	P C	GENERAL	350,000

LEOPOLD SCHEPP FOUNDATION 950 3RD AVE STE 3100 NEW YORK,NY 10022	N A	P C	EDUCATIONAL	25,000
MASTERSVOICES 57 WEST 57TH STREET 3RD FL STE 324 NEW YORK,NY 10019	N A	P C	GENERAL	20,000
METROPOLITAN MUSEUM OF ART 1000 5TH AVE NEW YORK,NY 10028	N A	P C	GENERAL	20,000
METROPOLITAN OPERA ASSOCIATION 30 LINCOLN CENTER NEW YORK,NY 10023	N A	P C	GENERAL	25,000
METROPOLITAN OPERA ORCHESTRA COMMITTEE 30 LINCOLN CENTER PLAZA NEW YORK,NY 100236922	N A	P C	GENERAL	2,500
MUSEUM OF MODERN ART (MOMA) 11 WEST 53RD STREET NEW YORK,NY 10019	N A	P C	GENERAL	35,000
NEW YORK PHILHARMONIC DAVID GEFFEN HALL 10 LINCOLN CENTER PLAZA NEW YORK,NY 10023	N A	P C	EDUCATIONAL	25,000
PLANNED PARENTHOOD NORTH CENTRAL SOUTH 196 SPEEDWELL AVE MORRISTOWN,NJ 07960	N A	P C	GENERAL	75,000
RONALD MCDONALD HOUSE OF THE GREATER HUDSON VALLEY 80 WOODS RD VALHALLA,NY 10595	N A	P C	GENERAL	25,000
SCHOOLSEED FOUNDATION 2670 UNION AVE MEMPHIS,TN 38112	N A	P C	EDUCATIONAL	5,000
SECTION 16H GROUP 323 BERGEN BOULEVARD FAIRVIEW,NJ 07022	N A	P C	GENERAL	30,000
SOUTH FLORIDA YOUTH FOUNDATION 1708 W 25TH STREET MIAMI BEACH,FL 33140	N A	P C	GENERAL	50,000
SYRACUSE UNIVERSITY 900 S CROUSE AVE SYRACUSE,NY 13244	N A	P C	EDUCATIONAL	120,000
THE CHICK MISSION INC 1460 BROADWAY NEW YORK,NY 10036	N A	P C	GENERAL	10,000
THE DOE FUND 345 E 102ND ST 305 NEW YORK NY,NY 10029	N A	P C	GENERAL	50,000
UNITED JEWISH APPEAL- FEDERATION OF JEWISH PHILANTHROPIES OF NY INC 130 EAST 59TH STREET	N A	P C	GENERAL	833,160

NEW YORK, NY 10022				
UNIVERSITY OF MIAMI 1320 S DIXIE HWY CORAL GABLES, FL 33146	NA	PC	EDUCATIONAL	50,000
UNIVERSITY OF MICHIGAN LAW SCHOOL 625 S STATE ST ANN ARBOR, MI 48109	NA	PC	EDUCATIONAL	500,000
REPAIR THE WORLD INC 25 BROADWAY 17TH FLOOR NEW YORK, NY 10004	NA	PC	GENERAL	350,000
<b>Total . . . . .</b>			<b>▶ 3a</b>	<b>5,917,460</b>
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b>			<b>▶ 3b</b>	<b>0</b>

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 investments, dividends, and other investment income.

12 Subtotal. Add columns (b), (d), and (e). 0 7,561,033 0
13 Total. Add line 12, columns (b), (d), and (e). 13 7,561,033
(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.



## **Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

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

**Special Condition Description**

# TY 2023 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	116,250	58,125		58,125

# TY 2023 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Category	Amount
NONE	0

## TY 2023 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	1,718,917	1,690,867
MORGAN STANLEY CORPORATE #761-143703	2,052,734	2,000,241
OPPENHEIMER & CO INC.	4,850,461	4,772,510

## TY 2023 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
MORGAN STANLEY 052-163655-904	1,570,148	1,763,331
FIDELITY INVESTMENTS - 647-265551	24,695,621	38,265,129
FIDELITY INVESTMENTS - 656-362223	2,959,495	4,666,050
MORGAN STANLEY #761-143703	18,409,080	25,754,803

## TY 2023 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

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

816,099

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

775,371

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

0

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

0

**TY 2023 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	2,745,310	3,606,490
FIDELITY INVESTMENTS - 656-251474	AT COST	1,877,145	2,351,764
FRANKLIN SQUARE KKR CAPITAL CORP	AT COST	5,209,644	2,525,669
FRANKLIN SQUARE RE INC. CL Y	AT COST	1,563,041	1,521,666
GOLUB CAPITAL PARTNERS 11	AT COST	873,155	873,155
MORGAN STANLEY #761-143702 (BLACKSTONE R/E)	AT COST	998,463	2,211,533
MORGAN STANLEY 052-163655-904-TCB BDC II (CARLYLE)	AT COST	2,175,847	1,973,794

# TY 2023 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	1,810,321	0		1,810,321

# TY 2023 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	405	405		0
AUTO EXPENSE	185	0		185
MISC CHARITY	5	0		5
DUES & SUBS	1,274	0		1,274
INSURANCE	8,123	0		8,123
MEMBERSHIP FEES	5,096	0		5,096
NON-DEDUCTIBLE EXP	18	0		0
NY STATE FILING FEE	1,500	0		1,500
OFFICE EXPENSE	9,929	0		9,929
PAYROLL PROCESSING	2,041	0		2,041

# TY 2023 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
LITIGATION INCOME	1,184	1,184	1,184
L.P. K-1 FLOW THRU AMOUNT	81,597	81,597	81,597
L.P. K-1 FLOW THRU AMOUNT ROYALTY INCOME	25	25	25

# TY 2023 IRS 990 e-File Render

**Name:** HIMAN BROWN CHARITABLE TRUST

**EIN:** 27-6669056

Description	Beginning of Year - Book Value	End of Year - Book Value
CREDIT CARD PAYABLE	0	2,131

# TY 2023 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
INVESTMENT ADVISORY FEES	340,287	340,287		0

# TY 2023 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	46,569	0		0
PAYROLL TAXES	8,195	0		8,195
FOREIGN WITHHOLDING TAXES	25,410	25,410		0