

For calendar year 2024, or tax year beginning 01-01-2024 , and ending 12-31-2024

Name of foundation HARRIS & FRANCES BLOCK FOUNDATION INC		A Employer identification number 31-1784246
Number and street (or P.O. box number if mail is not delivered to street address) 491 ENNIS HILL ROAD	Room/suite	B Telephone number (see instructions) (802) 426-3806
City or town, state or province, country, and ZIP or foreign postal code MARSHFIELD, VT 05658		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>11,241,629</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)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	829	829		
	4 Dividends and interest from securities	327,670	327,670		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	297,274			
	b Gross sales price for all assets on line 6a _____ 2,621,536				
	7 Capital gain net income (from Part IV, line 2)		297,274		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	-8,706	-5,954		
	12 Total. Add lines 1 through 11	617,067	619,819		
	13 Compensation of officers, directors, trustees, etc.	164,461	58,891		105,570
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	8,200	8,200		0
	c Other professional fees (attach schedule)	111,105	60,101		51,004
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	27,290	14,877		6,000
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	406	0		406
	22 Printing and publications				
	23 Other expenses (attach schedule)	37,343	16,360		20,554
	24 Total operating and administrative expenses. Add lines 13 through 23	348,805	158,429		183,534
	25 Contributions, gifts, grants paid	686,520			686,520
	26 Total expenses and disbursements. Add lines 24 and 25	1,035,325	158,429		870,054
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-418,258			
	b Net investment income (if negative, enter -0-)		461,390		
	c Adjusted net income (if negative, enter -0-)				

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				
	2	Savings and temporary cash investments	2,115,426	637,849	637,849	
	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)	1,880,768	1,085,191	1,085,191	
	b	Investments—corporate stock (attach schedule)	4,340,112	6,475,619	6,475,619	
	c	Investments—corporate bonds (attach schedule)	1,409,517	1,889,639	1,889,639	
	11	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)	1,579,502	1,134,469	1,134,469	
	14	Land, buildings, and equipment: basis ▶ 7,355 Less: accumulated depreciation (attach schedule) ▶ 7,355				
15	Other assets (describe ▶ _____)	43,628	18,862	18,862		
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	11,368,953	11,241,629	11,241,629		
Liabilities	17	Accounts payable and accrued expenses	31,241	3,710		
	18	Grants payable				
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22).	31,241	3,710		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.		11,337,712	11,237,919		
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds				
	29	Total net assets or fund balances (see instructions)				11,337,712
30	Total liabilities and net assets/fund balances (see instructions) .	11,368,953	11,241,629			

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	11,337,712
2	Enter amount from Part I, line 27a	2	-418,258
3	Other increases not included in line 2 (itemize) ▶ _____	3	318,465
4	Add lines 1, 2, and 3	4	11,237,919
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	11,237,919

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 CAPITAL GAINS DIVIDENDS		P		
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,618,400		2,324,262	294,138
b 3,136			3,136
c			
d			
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			294,138
b			3,136
c			
d			
e			

2 Capital gain net income or (net capital loss)

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

If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7

2

3

297,274

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	6,413
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	6,413
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	6,413
6	Credits/Payments:		
a	2024 estimated tax payments and 2023 overpayment credited to 2024	6a	11,134
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	11,134
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	0
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	4,721
11	Enter the amount of line 10 to be: Credited to 2025 estimated tax Refunded	11	0

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.			No
	<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>			
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		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
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) ▶ VT			
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	Yes	
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 2024 or the taxable year beginning in 2024? 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.BLOCKFOUND.ORG	13	Yes	
14	The books are in care of ▶ ALPINE FIVE LLC Telephone no. ▶ (802) 324-9270 Located at ▶ 3133 JACARILLO TRAIL SOUTH LAKE TAHOE CA ZIP+4 ▶ 96150			
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 2024, 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	Yes	No

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)	Yes
(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 2024?	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 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024? If "Yes," list the years  20____, 20____, 20____, 20____	2a	No
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 2024 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 2024.).	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 2024?	4b	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))?

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

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?

7a

No

b

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

7b

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?

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
NANCY M SLUYS 197 MINGLEWOOD RD WESTFIELD, NC 27053	PRESIDENT 1.00	8,000	0	0
ELIZABETH M CHODORKOFF 491 ENNIS HILL RD MARSHFIELD, VT 05658	EX. DIRECTOR & TREASURER 30.00	68,877	0	0
REBECCA ROBINSON 972 BEDFORD AVENUE BROOKLYN, NY 11205	PROGRAM DIRECTOR & TRUSTEE 30.00	79,584	0	0
LISA CHODORKOFF OVERGADEN OVEN VANDET 60B 1TH COPENHAGEN, COPENHAGEN DA	SECRETARY 1.00	8,000	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.

Part VII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

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

0

Part VIII- 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	
2	
3	
4	

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
1	
2	
All other program-related investments. See instructions.	
3	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	10,799,644
b	Average of monthly cash balances.	1b	226,674
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	11,026,318
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	11,026,318
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	165,395
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	10,860,923
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	543,046

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

1	Minimum investment return from Part IX, line 6.	1	543,046
2a	Tax on investment income for 2024 from Part V, line 5.	2a	6,413
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	6,413
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	536,633
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	536,633
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	536,633

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	870,054
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	
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	870,054

Part XII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				536,633
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			0	
b Total for prior years: 20 __, 20 __, 20 __		0		
3 Excess distributions carryover, if any, to 2024:				
a From 2019.	121,213			
b From 2020.	111,378			
c From 2021.	140,656			
d From 2022.	343,554			
e From 2023.	302,532			
f Total of lines 3a through e.	1,019,333			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ 870,054				
a Applied to 2023, but not more than line 2a			0	
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 2024 distributable amount				536,633
e Remaining amount distributed out of corpus	333,421			
5 Excess distributions carryover applied to 2024. (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	1,352,754			
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 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				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 2019 not applied on line 5 or line 7 (see instructions)	121,213			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	1,231,541			
10 Analysis of line 9:				
a Excess from 2020	111,378			
b Excess from 2021	140,656			
c Excess from 2022.	343,554			
d Excess from 2023	302,532			
e Excess from 2024	333,421			

a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2024, 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)

Form **990-PF** (2024)

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)				
a <i>Paid during the year</i>				
ADDISON COUNTY COMMUNITY ACTION GROUP 282 BOARDMAN ST SUITE 1A MIDDLEBURY,VT 05753	N/A	P C	FOR HEAT PUMP FOR HOPE FOOD SHELF	2,500
ASSOCIATION FOR THE PROTECTION OF THE ENO RIVER 4404 GUEST ROAD DURHAM,NC 27712	N/A	P C	ENVIRONMENTAL EDUCATION AND PROTECTION OF THE ENO RIVER	15,000
CAMP THORPE PO BOX 82 BRANDON,VT 05733	N/A	P C	FARM TO TABLE GARDENING PROGRAMMING	2,000
CENTER FOR AN AGRICULTURAL ECONOMY PO BOX 422 HARDWICK,VT 05843	N/A	P C	FOOD ACCESS AND FOOD SOVEREIGNTY	20,000
CENTER FOR CREATIVE AGING NC 2400 SUMMIT AVE GREENSBORO,NC 27405	N/A	P C	BRINGING GENERATIONS TOGETHER THROUGH ART, FOOD, AND FARMING	25,000
COMMUNITY RESILIENCE ORGANIZATIONS 175 SNOWBRIDGE ROAD BARRE,VT 05401	N/A	P C	ENVIRONMENTAL JUSTICE NETWORK	20,000
CONSERVATION LAW FOUNDATION 62 SUMMER STREET BOSTON,MA 02110	N/A	P C	SLINGSHOT GRANT AWARD; BUILDING COMMUNITY POWER FOR ENVIRONMENTAL JUSTICE IN VT.	25,000
FAIRBANKS MUSEUM AND PLANETARIUM 1302 MAIN STREET ST JOHNSBURY,VT 05819	N/A	P C	ENVIRONMENTAL EDUCATION PROGRAMMING AT THE METSINGER FOREST	26,520
FLORIDA SCHOOL FOR HOLISTIC LIVING PO BOX 420 EAST BARRE,VT 05649	N/A	P C	CHILDREN'S NATURE AFTER-SCHOOL PROGRAM	10,000
GOOD WORK INSTITUTE 65 SAINT JAMES STREET KINGSTON,NY 12401	N/A	P C	GENERAL SUPPORT FOR ROCK STEADY FARM	15,000
INSTITUTE FOR SOCIAL ECOLOGY PO BOX 48 PLAINFIELD,VT 05667	N/A	P C	POPULAR EDUCATION FOR RACIAL AND ENVIRONMENTAL JUSTICE	35,000
JAQUITH PUBLIC LIBRARY 122 SCHOOL STREET MARSHFIELD,VT 05658	N/A	P C	MARSHFIELD RESILIENCE HUB-FOOD SECURITY PROJECT	27,000
LIVING EARTH SCHOOL PO BOX 686 CHARLOTTESVILLE,V A 22902	N/A	P C	NATURE BASED EDUCATION FOR ALL	10,000
MERRYMAC FARM SANCTUARY 490 LIME KILN ROAD CHARLOTTE,VT 05401	N/A	P C	ANIMAL SANCTUARY	3,000
MIGRANT JUSTICE	N/A	P C	HUMAN RIGHTS FOR IMMIGRANT FARMWORKERS PROJECT	30,000

294 N WINOOSKI AVE BURLINGTON,VT 05401				
MITCHELL GIVING GARDENS PO BOX 356 SPRUCE PINE,NC 28777	N/A	P C	FRESH FOOD FOR ALL	15,000
MONTPELIER PARKS AND TREES DEPARTMENT 39 MAIN STREET MONTPELIER,VT 05602	N/A	GOV	MONTPLIER COMMUNITY FEAST FARM PROJECT	30,000
MOUNTAIN SCHOOL AT WINHALL 9 SCHOOL STREET WINHALL,VT 05340	N/A	P C	ART, SCIENCE, AND THE ENVIRONMENT	3,000
MOVEMENT FOR JUSTICE IN EL BARRIO 575 FIFTH AVENUE 14TH FLOOR NEW YORK,NY 10017	N/A	P C	ENVIRONMENTAL JUSTICE AND IMMIGRATION	35,000
PARTNERSHIP FOR APPALACHIAN GIRLS' EDUCATION 177 BAILEYS BRANCH ROAD OFFICE 10 MARSHALL,NC 28753	N/A	P C	EXPLORING APPALACHIAN ENVIRONMENTS - STEM LABS	25,000
PLANNED PARENTHOOD OF NNE 784 HERCULES DR ST 110 COLCHESTER,VT 05446	N/A	P C	DELIVERING LIFE CHANGING CARE	25,000
PLANNED PARENTHOOD OF THE ROCKY MOUNTAINS 7155 EAST 38TH AVENUE DENVER,CO 80207	N/A	P C	ABORTION ACCESS FUND	25,000
PLANNED PARENTHOOD SOUTH ATLANTIC 3000 MAPLEWOOD AVE SUITE 112 WINSTONSALEM,NC 28401	N/A	P C	CONSTITUENCY ORGANIZING PROGRAMS AT PPSAT	15,000
RESOURCE 329 HARVEST LN SUITE 200 WILLISTON,VT 05495	N/A	P C	GREEN BUILDING & YOUTH CLIMATE WORKFORCE DEVELOPMENT TRAINING	10,000
RURAL VERMONT 46 EAST STATE STREET MONTPELIER,VT 05602	N/A	P C	FARM-BASED LIVELIHOOD, RESILIENT COMMUNITIES, AND HEALTHY FARM ECOSYSTEMS	25,000
SNACC INC 201 VERICK STREET 542 NEW YORK,NY 10014	N/A	P C	FOOD EDUCATION IN NYC	25,000
SOCIAL GOOD FUND INC PO BOX 5473 RICHMOND,CA 94805	N/A	P C	PUBLIC POWER AND RENEWABLE ENRGY IN BROOKLYN	10,000
SOUTH VISION ALLIANCE 1803 CHAPEL HILL ROAD SUITE A DURHAM,NC 27707	N/A	P C	NOT ONE MORE LIFE PROJECT. MIGRANT FARMWORKER SUPPORT	25,000
SUPER HERO CLUBHOUSE 1716 CATON AVE BROOKLYN,NY 11226	N/A	P C	BIG GREEN THEATER	10,000
THE NORTH BRANCH NATURE CENTER 713 ELM STREET MONTPELIER,VT 05602	N/A	P C	NATURE BASED ENVIRONMENTAL EDUCATION & EQUITY	20,000
TINY SEED PROJECT 154 SILVER ROAD EAST HARDWICK,VT 05835	N/A	P C	UPPER VALLEY SUPER COMPOST PROJECT	25,000

TRANSPLANTING TRADITIONS COMMUNITY FOUNDATION PO BOX 394 CARRBORO,NC 27510	N/A	P C	TRANSPLANTING TRADITIONS REFUGEE YOUTH AND ADULTS	25,000
TRIAD PRIDE PERFORMING ARTS 200 N DAVIS STREET BOX 20 GREENSBORO,NC 27401	N/A	P C	THEATER FOR ALL	2,500
UTOPEAN SEED PROJECT 243 HAYWOOD STREET ASHEVILLE,NC 28801	N/A	P C	FOOD AND ENVIRONMENTAL JUSTICE	25,000
VAN CORTLANDT PARK ALLIANCE 80 VAN CORTLANDT PARK SOUTH STE E1 BRONX,NY 10463	N/A	P C	GARDEN TO MARKET INTERNSHIP PROGRAM	10,000
VPIRG 141 MAIN STREET 6 MONTPELIER,VT 05602	N/A	P C	2ND YEAR OF POLLINATOR CAMPAIGN, ENVIRONMENT	20,000
WILLING HANDS ENTERPRISES 198 CHURCH STREET NORWICH,VT 05055	N/A	P C	FOOD RESCUE AND DISTRIBUTION TO NON- PROFITS	15,000
Total ▶ 3a				686,520
b Approved for future payment				
Total ▶ 3b				0

Enter gross amounts unless otherwise indicated.

3 Total. Add line 12, columns (b), (d), and (e). .

3 Total. Add line 12, columns (b), (d), and (e). **13** 617,067
(See worksheet in line 13 instructions to verify calculations.)

[illegible]

Part XVI

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

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

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.

[illegible]

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.

	2025-09-16
Signature of officer or trustee	Date

2025-09-16

Title

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

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	CONNIE FELLION		2025-09-16		P01875413
	Firm's name ► MCSOLEY MCCOY & CO				Firm's EIN ► 03-032737
	Firm's address ► 118 TILLEY DRIVE STE 202 SOUTH BURLINGTON, VT 05403				Phone no. (802) 658-1808

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	8,200	8,200		0

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BLUE RIDGE DISCOVERY CENTER INC.	195,122	195,122
CALVERT IMPACT 5.0% 10/15/29	487,723	487,723
CALVERT IMPACT 5.0% 12/15/28	490,448	490,448
SELF-HELP FEDERAL CREDIT UNION	490,400	490,400
THE NATURE CONSERVANCY	225,946	225,946

Name: HARRIS & FRANCES BLOCK FOUNDATION INC
EIN: 31-1784246

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AGCO CORP	82,730	82,730
AMALGAMATED FINANCIAL CORPORATION	54,456	54,456
AMERESCO INC	38,578	38,578
AMERICAN WTR WKS CO INC	229,062	229,062
APPLE INC	247,665	247,665
ARISTA NETWORKS INC	128,215	128,215
ASML HOLDING NV	115,744	115,744
AUTOMATIC DATA PROCESSING	65,279	65,279
BEIERSDORF AG	127,100	127,100
BROADCOM INC	247,605	247,605
CAMDEN NATL CORP	170,960	170,960
CHECK PT SOFTWARE	224,040	224,040
CHIPOTLE MEXICAN GRILL	109,746	109,746
CISCO SYSTEMS INC.	133,200	133,200
COLUMBIA BOOKING SYS INC	82,570	82,570
COOPERATIVE REGIONS OF ORGANIC PRODUCER POOLS CL E	100,000	100,000
FEDERAL AGRI 4.875% PFD	184,775	184,775
FERGUSON ENTERPRISES INC	106,919	106,919
FIRST SOLAR	138,348	138,348
GSK PLC	286,963	286,963
HA SUSTAINABLE INFRASTRUCTURE	82,153	82,153
HENRY JACK & ASSOC INC	151,109	151,109
HIGH MOWING SEED COMPANY	100,011	100,011
HOLOGIC INC	103,305	103,305
HUBBELL INC	92,156	92,156
IBM CORP	337,439	337,439
KONINKLIJKE AHOLD N.V.	195,540	195,540
LULULEMON ATHLETICA INC	90,631	90,631
MCCORMICK & CO INC	154,310	154,310
NETFLIX INC	58,827	58,827
NOVENESIS AS	145,251	145,251
NVIDIA CORP	206,538	206,538
QUEST DIAGNOSTIC INC	95,796	95,796
ROSS STORES INC	105,586	105,586
S J W GROUP	147,660	147,660
SALESFORCE INC	133,732	133,732
SERVICENOW INC	143,116	143,116
SHIMANO INC	93,660	93,660
SMITH & NEPHEW GROUP	172,060	172,060
SPROUTS FARMERS MARKET	254,140	254,140
TAKEDA PHARMA COMPANY	211,840	211,840
TOTO LTD	65,302	65,302
UNILEVER PLC	162,899	162,899
UNITED PARCEL SERVICE INC	44,135	44,135
VEEVA SYS INC	119,422	119,422
VITAL FARMS INC	65,656	65,656
WABTEC	69,390	69,390

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

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

1,085,191

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

1,085,191

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

0

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

0

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BLACK FARMER FUND INC	FMV	100,000	100,000
IROQUOIS VALLEY FARMLAND REIT	FMV	154,440	154,440
NORTHEAST KINGDOM TASTING CENTER	FMV	40,036	40,036
OWEESTA CORPORATION	FMV	100,000	100,000
REINVENTURE CAPITAL FUND I LP	FMV	195,275	195,275
SAFER MADE LP	FMV	51,614	51,614
SUN INITIATIVE FINANCING	FMV	25,000	25,000
SUNWEALTH LOAN COMPANY	FMV	100,000	100,000
THE LYME FOREST FUND IV TE LP	FMV	43,092	43,092
THE LYME FOREST FUND V TE LP	FMV	165,656	165,656
THE SKINNY PANCAKE	FMV	50,000	50,000
VERMONT COMMUNITY LOAN	FMV	70,000	70,000
VSJF FLEXIBLE CAPITAL FUND L3C	FMV	39,356	39,356

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
EXCISE TAX REFUND RECEIVABLE	11,134	4,721	4,721
ACCRUED INVESTMENT INCOME	27,408	14,141	14,141
OTHER RECEIVABLES	5,086	0	0

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INFORMATION TECHNOLOGY	25,739	839		24,900
INSURANCE, NET	-4,307	323		-4,630
OFFICE EXPENSES	382	125		257
OTHER INVESTMENT EXPENSES	15,502	15,073		0
MISCELLANEOUS	27	0		27

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ORDINARY GAINS FROM PARTNERSHIP	-7,067	-4,315	-7,067
PARTNERSHIP RENTAL LOSSES	-3,014	-3,014	-3,014
OTHER PERTNERSHIP GAINS	1,375	1,375	1,375

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	318,465

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	59,670	59,670		0
PAYROLL PROCESSING FEES	875	263		612
CONSULTANTS	50,560	168		50,392

TY 2024 IRS 990 e-File Render

Name: HARRIS & FRANCES BLOCK FOUNDATION INC

EIN: 31-1784246

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	9,585	3,585		6,000
FOREIGN TAXES AND ADR FEES	11,292	11,292		0
FEDERAL EXCISE TAX	6,413	0		0