

For calendar year 2022, or tax year beginning 01-01-2022, and ending 12-31-2022

Name of foundation Marion and Henry Bloch Family Foundation		A Employer identification number 45-4047901	
% DAVID MILES			
Number and street (or P.O. box number if mail is not delivered to street address) 4801 Main Street Ste 400	Room/suite	B Telephone number (see instructions) (816) 854-4361	
City or town, state or province, country, and ZIP or foreign postal code Kansas City, MO 64112		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) ▶ \$ 565,896,497	J Accounting method: ☐ Cash ☐ Accrual ☒ Other (specify) <u>MODIFIED CASH</u> (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)	3,299,304			
	2 Check ▶ ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	292,363	1,414,082		
	4 Dividends and interest from securities . . .	7,595,322	9,222,738		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	9,227,796			
	b Gross sales price for all assets on line 6a				
		93,822,234			
	7 Capital gain net income (from Part IV, line 2) . . .		0		
	8 Net short-term capital gain				
	9 Income modifications				
Operating and Administrative Expenses	10a Gross sales less returns and allowances				
	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	 10,633	1,459,274		
	12 Total. Add lines 1 through 11	20,425,418	12,096,094		
	13 Compensation of officers, directors, trustees, etc.	270,932	43,349		227,583
	14 Other employee salaries and wages	508,146	81,303		431,922
	15 Pension plans, employee benefits	90,218	14,435		75,783
	16a Legal fees (attach schedule)	 15,343	7,672	0	4,603
	b Accounting fees (attach schedule)	 61,466	30,733	0	11,870
	c Other professional fees (attach schedule)	 5,420,655	5,419,324		133
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	 1,543,984	677,864		38,643
	19 Depreciation (attach schedule) and depletion . . .	 33,469			
	20 Occupancy	120,855	6,043		114,812
	21 Travel, conferences, and meetings	6,350	317		6,033
	22 Printing and publications				
	23 Other expenses (attach schedule)	 220,108	7,197		210,616
	24 Total operating and administrative expenses. Add lines 13 through 23	8,291,526	6,288,237	0	1,121,998
	25 Contributions, gifts, grants paid	32,002,603			32,002,710
	26 Total expenses and disbursements. Add lines 24 and 25	40,294,129	6,288,237	0	33,124,708
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-19,868,711			
	b Net investment income (if negative, enter -0-)		5,807,857		
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	1,290,129	214,041	214,041
	2 Savings and temporary cash investments	32,549,435	28,388,811	28,388,811
	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)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	646,838,216	536,916,195	536,916,195
	14 Land, buildings, and equipment: basis ▶ <u>385,167</u> Less: accumulated depreciation (attach schedule) ▶ <u>48,495</u>	348,626	336,672	336,672
15 Other assets (describe ▶ _____)	37,131	40,778	40,778	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	681,063,537	565,896,497	565,896,497	
Liabilities	17 Accounts payable and accrued expenses	2,400	0	
	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)	2,400	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	681,061,137	565,896,497	
	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)	681,061,137	565,896,497	
30 Total liabilities and net assets/fund balances (see instructions) .	681,063,537	565,896,497		

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	681,061,137
2 Enter amount from Part I, line 27a	2	-19,868,711
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	661,192,426
5 Decreases not included in line 2 (itemize) ▶ _____	5	95,295,929
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	565,896,497

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	80,729
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	
3	Add lines 1 and 2.	3	80,729
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	80,729
6	Credits/Payments:		
a	2022 estimated tax payments and 2021 overpayment credited to 2022	6a	538,851
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	538,851
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2221 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	458,122
11	Enter the amount of line 10 to be: Credited to 2023 estimated tax 458,122 Refunded	11	

Part VI-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0 (2) On foundation managers. \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) MO		
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 2022 or the taxable year beginning in 2022? 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

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.	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? If "Yes," attach statement. See instructions.	12	Yes	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► BLOCHFAMILYFOUNDATION.ORG	13	Yes	
14	The books are in care of ► DAVID MILES Telephone no. ► (816) 854-4372			

Located at ► **4801 MAIN STREET SUITE 400 Kansas City MO** ZIP+4 ► **64112**

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?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ►			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly):		Yes	No
	(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 2022?	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 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?	2a		No
	If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a		No
b	If "Yes," did it have excess business holdings in 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.)	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 2022?	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:		Yes	No
	(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?. If "Yes," attach the statement required by Regulations section 53.4945–5(d).	5d		
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?. If "Yes" to 6b, file Form 8870.	6b		No
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
See Additional Data Table				
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
JEAN-PAUL CHAURAND	EXEC VISE PRESIDENT	183,496	21,174	0
4801 MAIN STREET STE 400 KANSAS CITY, MO 64112	33.0			
KRIS WILCOXSON	ACCOUNTANT	139,467	12,866	0
4801 MAIN STREET STE 400 KANSAS CITY, MO 64112	29.0			
RACHEL CARLTON	ASSOCIATE GRANTS DIR	76,478	9,443	0
4801 MAIN STREET STE 400 KANSAS CITY, MO 64112	29.0			
VALERIE SALAZAR	GRANTMAKING PRINCIPA	71,520	11,004	0
4801 MAIN STREET STE 400 KANSAS CITY, MO 64112	24.0			
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
FORVIS LLP 1201 Walnut Street Suite 1700 KANSAS CITY, MO 641062246	Tax and Audit SVCS	52,434
CAMBRIDGE ASSOCIATES LLC 4100 North Fairfax Drive Suite 130 ARLINGTON, VA 22203	INVESTMENT ADVISOR	1,205,373
ANDRAS SZANTO LLC 225 EASTERN PARKWAY 4A BROOKLYN, NY 112386383	DESIGN/CONSULTING	63,930

Total number of others receiving over \$50,000 for professional services. ▶**Part VIII-A** Summary of Direct Charitable Activities

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

	Expenses
1 _____ _____ _____	
2 _____ _____ _____	
3 _____ _____ _____	
4 _____ _____ _____	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 _____ _____ _____	
2 _____ _____ _____	
All other program-related investments. See instructions.	
3 _____ _____ _____	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	445,720,482
b	Average of monthly cash balances.	1b	38,769,150
c	Fair market value of all other assets (see instructions).	1c	150,026,827
d	Total (add lines 1a, b, and c).	1d	634,516,459
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	634,516,459
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	9,517,747
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	624,998,712
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	31,249,936

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	31,249,936
2a	Tax on investment income for 2022 from Part V, line 5.	2a	80,729
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	57,334
c	Add lines 2a and 2b.	2c	138,063
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	31,111,873
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	31,111,873
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	31,111,873

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	33,124,708
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	33,124,708

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				31,111,873
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.			28,828,718	
b Total for prior years: 2020 , 2019 , 2018		1,464,372		
3 Excess distributions carryover, if any, to 2022:				
a From 2017.				
b From 2018.				
c From 2019.				
d From 2020.				
e From 2021.	0			
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ <u>33,124,708</u>				
a Applied to 2021, but not more than line 2a			28,828,718	
b Applied to undistributed income of prior years (Election required—see instructions).		1,464,372		
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2022 distributable amount.				2,831,618
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2022. (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	0			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023.				28,280,255
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9:				
a Excess from 2018.				
b Excess from 2019.				
c Excess from 2020.				
d Excess from 2021.				
e Excess from 2022.	0			

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)

	Tax year	Prior 3 years			(e) Total
	(a) 2022	(b) 2021	(c) 2020	(d) 2019	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

HENRY W BLOCH

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.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

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

MARIONHENRY BLOCH FAM FOUNDATION
4801 MAIN STREET STE 400
KANSAS CITY, MO 64112
(816) 854-4361

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

VISIT BLOCHFAMILYFOUNDATION.ORG FOR GRANT APPLICATIONS AND SUBMISSION GUIDELINES.

c Any submission deadlines:

VISIT BLOCHFAMILYFOUNDATION.ORG FOR CURRENT SUBMISSION DEADLINES.

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

THE FOUNDATION GENERALLY MAKES ONE-YEAR GRANTS. HOWEVER, THE FOUNDATION WILL CONSIDER MULTI-YEAR REQUESTS. GRANTS ARE MADE ONLY TO TAX EXEMPT 501(C)(3) ORGANIZATIONS THAT ARE NOT CLASSIFIED AS PRIVATE FOUNDATIONS. THE FOUNDATION CONSIDERS SUPPORT FOR ORGANIZATIONS THAT ARE BASED IN AND SERVICE RESIDENTS WITHIN THE GREATER KANSAS CITY AREA.

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Form **990-PF** (2022)

Enter gross amounts unless otherwise indicated.

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

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 (other than by providing funds for such purposes). (See instructions.)

[illegible]

Part XVI

- [illegible]

- | | | |
|---|--|--|
| <p>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.</p> | | |
| <p>Sign Here ▶</p> <p>*****</p> <p>_____</p> <p>Signature of officer or trustee</p> | <p>2023-11-15</p> <p>_____</p> <p>Date</p> | <p>*****</p> <p>_____</p> <p>Title</p> |

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

See instructions. ☐ Yes ☒ No

**Paid
Preparer
Use Only**

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e.g., real estate, (a) 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 PUBLICLY TRADED SECURITIES (35029 ST)	P		
1 PUBLICLY TRADED SECURITIES (35029 LT)	P		
PUBLICLY TRADED SECURITIES (35029 CG)	P		
PUBLICLY TRADED SECURITIES - PARAMETRIC	P		
LOSS FROM PASSTHROUGH ACTIVITIES	P		
PUBLICLY TRADED SECURITIES - WELLINGTON	P		
PUBLICLY TRADED SECURITIES (35011)	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
21,349,535		20,375,338	974,197
50,722,201		49,018,654	1,703,547
689,720			689,720
		2,500,981	-2,500,981
		7,738,398	-7,738,398
21,039,750		14,846,674	6,193,076
21,028			21,028

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (l) over col. (j), if any	
			974,197
			1,703,547
			689,720
			-2,500,981
			-7,738,398
			6,193,076
			21,028

Form 990PF Part VII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
THOMAS M BLOCH 4801 Main Street Ste 400 Kansas City, MO 64112	CHAIRMAN & DIRECTOR 3.0	0	0	0
ROBERT L BLOCH 4801 Main Street Ste 400 Kansas City, MO 64112	VICE CHAIRMAN & DIRECTOR 0.5	0	0	0
MARY JO BROWN 4801 Main Street Ste 400 Kansas City, MO 64112	ASSISTANT SECRETARY & DIRECTOR 0.5	0	0	0
BRUCE C DAVISON 4801 Main Street Ste 400 Kansas City, MO 64112	VICE CHAIRMAN & DIRECTOR 0.75	0	0	0
WILLIAM A HALL 4801 Main Street Ste 400 Kansas City, MO 64112	TREASURER & DIRECTOR 0.75	0	0	0
JOHN R PHILLIPS 4801 Main Street Ste 400 Kansas City, MO 64112	DIRECTOR 0.5	0	0	0
ELIZABETH B UHLMANN 4801 Main Street Ste 400 Kansas City, MO 64112	SECRETARY & DIRECTOR 0.5	0	0	0
LEO MORTON 4801 Main Street Ste 400 Kansas City, MO 64112	DIRECTOR 0.5	0	0	0
DAVID P MILES 4801 Main Street Ste 400 Kansas City, MO 64112	PRESIDENT 31.0	270,932	22,915	0
DEBBIE SOSLAND-EDELMAN 4801 Main Street Ste 400 Kansas City, MO 64112	ASST TREASURER & DIRECTOR 0.75	0	0	0

Form 990PF Part XIV Line 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>				
SEE ATTACHED STATEMENT 4801 MAIN STREET STE 400 Kansas City, MO 64112	none	PC	See attached statement	32,002,603
Contributions from Passthrough activity 4801 main street ste 400 kansas city, MO 64112	none	PC	GENERAL SUPPORT	107
Total ▶ 3a				32,002,710

TY 2022 Accounting Fees Schedule**Name:** Marion and Henry Bloch Family Foundation**EIN:** 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING AND AUDIT FEES	61,466	30,733		11,870

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2022 Depreciation Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

TY 2022 Legal Fees Schedule**Name:** Marion and Henry Bloch Family Foundation**EIN:** 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	15,343	7,672		4,603

TY 2022 Other Assets Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DUE FROM H & R BLOCK FOUNDATIO	37,131	40,778	40,778

TY 2022 Other Decreases Schedule

Name: Marion and Henry Bloch Family Foundation
EIN: 45-4047901

Description	Amount
UNREALIZED LOSSES	95,295,929

TY 2022 Other Expenses Schedule**Name:** Marion and Henry Bloch Family Foundation**EIN:** 45-4047901**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INFORMATION TECHNOLOGY	37,690	1,379		36,310
SPECIAL EVENTS	7,139			6,782
INSURANCE - CONTENTS	18,434	922		17,512
INSURANCE - GENERAL	15,154	758		13,639
PROCESSING FEES	7,462	1,194		6,268
PROFESSIONAL DEVELOPMENT	2,659	425		2,234
OFFICE SUPPLIES	457	23		411
REPAIRS & MAINTENANCE	1,006	50		956
UTILITIES	4,741	237		4,504
COMMUNICATIONS	6,271			5,644

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BLOCH SCHOOL	5,243			5,243
NELSON ATKINS MUSUEM OF ART	64,475			64,475
MISCELLANEOUS OCCUPANCY	1,782	89		1,693
MISCELLANEOUS OPERATIONS COSTS	5,301	2,120		2,651
MISCELLANEOUS	42,294			42,294

TY 2022 Other Income Schedule**Name:** Marion and Henry Bloch Family Foundation**EIN:** 45-4047901**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Income (Loss) from Schedules K-1		1,459,274	
miscellaneous Income	10,633		

TY 2022 Other Professional Fees Schedule**Name:** Marion and Henry Bloch Family Foundation**EIN:** 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADV. & SERVICE FEES	2,208,188	2,208,188		
CONSULTING FEES	1,331			133
MANAGEMENT FEES	3,211,136	3,211,136		

TY 2022 Taxes Schedule**Name:** Marion and Henry Bloch Family Foundation**EIN:** 45-4047901**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES AND STATE TAXES	1,473,591			
FOREIGN TAXES	24,390	670,504		
PAYROLL TAXES	46,003	7,360		38,643

Schedule B (Form 990) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to <u>www.irs.gov/Form990</u> for the latest information.	OMB No. 1545-0047
		2022
Name of the organization Marion and Henry Bloch Family Foundation		Employer identification number 45-4047901

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
Marion and Henry Bloch Family Foundation

Employer identification number
45-4047901

Part I

Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	HENRY W BLOCH INTERIM TRUST C/O COMMERCE BANK 118 W 47TH STRE KANSAS CITY, MO 64112	\$ 46,209	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
2	Henry W Bloch Charitable Lead Trus C/O COMMERCE BANK 118 W 47TH STRE KANSAS CITY, MO 64112	\$ 3,192,950	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
3	Henry W Bloch Revocable Trust C/O COMMERCE BANK 118 W 47TH STRE Kansas City, MO 64112	\$ 41,145	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization Marion and Henry Bloch Family Foundation	Employer identification number 45-4047901
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given (see instructions). Use duplicate copies of Part II if additional space is needed.	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____

Name of organization Marion and Henry Bloch Family Foundation	Employer identification number 45-4047901
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed.
-----------------	---

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	-		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	-		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	-		
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	-		

Marion and Henry Bloch Family Foundation

Attachment to Part XIV, Line 3A

12/31/2022

Date	Name	Address	Purpose of Grant	Foundation Status	Amount of Grant Paid
01/05/2022	Children's Mercy Hospital	2401 Gillham Rd Kansas City, MO 64108-4619	Matching Gift	PC	5,000.00
01/05/2022	Jewish Federation of Greater KC	5801 W 115th Street, Ste 201 Overland Park, KS 66211-1800	Matching Gift	PC	1,000.00
01/05/2022	Plaza Academy	3930 Broadway Boulevard Kansas City, MO 64111	Matching Gift	PC	3,000.00
01/05/2022	UMKC Foundation	5115 Oak Street 202 Administrative Center Kansas City, MO 64112	Matching Gift	PC	1,000.00
02/03/2022	The Temple, Congregation Bnai Jehudah	12320 Nall Ave Overland Park, KS 66209	Matching Gift	PC	5,580.00
02/24/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Matching Gift	PC	15,000.00
02/24/2022	MARC Comm Serv Corp	600 Broadway Blvd, Ste 300 Kansas City, MO 64105-1554	Double Up Food Bucks Heartland	PC	50,000.00
02/24/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	Matching Gift	PC	2,000.00
02/24/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	Memberships, sponsorships, events	PC	200,000.00
03/17/2022	Okos Development Corporation	1712 Main Street, Suite 206 Kansas City, MO 64111	NE KCMO Housing Project	PC	225,000.00
03/17/2022	UMKC Foundation	5115 Oak Street 202 Administrative Center Kansas City, MO 64112	QV/C Research Teams	PC	300,000.00
03/17/2022	UMKC Foundation	5115 Oak Street 202 Administrative Center Kansas City, MO 64112	Senior Clinical Informatician	PC	100,000.00
03/17/2022	Vibrant Health	21 N 12th Street, Ste 300 Kansas City, KS 66102-5105	clinic merger and dental capacity expansion	PC	125,000.00
04/20/2022	Arts KC-regional Arts Council	106 SOUTHWEST BOULEVARD KANSAS CITY, MO 64108-1924	Cultural ecosystem recovery and advancement	PC	150,000.00
04/20/2022	MARC Comm Serv Corp	600 Broadway Blvd, Ste 300 Kansas City, MO 64105-1554	Covid 19 recovery and response activities	PC	200,000.00
04/20/2022	UMKC Foundation	5115 Oak Street 202 Administrative Center Kansas City, MO 64112	budget model assessment and optimization	PC	100,000.00
04/20/2022	Bethel Neighborhood Center	14 S 7th St Trafficway Kansas City, KS 66101	capital campaign - health/wellness space and program	PC	200,000.00
04/20/2022	OATS, Inc.	2501 Maguire Blvd, Suite 101 Columbia, MO 65201	transportation hub for KC	PC	100,000.00
04/20/2022	LevellUp Kids	5416 NE Antioch Road Kansas City, MO 64119-2507	Matching gift	PC	250.00
04/20/2022	Jewish Federation of Greater KC	5801 W 115th Street, Ste 201 Overland Park, KS 66211-1800	Matching gift	PC	6,666.00
05/05/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	2022 contribution agreement	PC	441,667.00
05/23/2022	Union Station Kansas City, Inc.	30 W Pershing Rd., Suite 400 Kansas City, MO 64108	Auschwitz ticket access program	PC	20,970.00
06/06/2022	Saint Luke's Foundation	901 E. 104th Street, Mail Stop 1005 Kansas City, MO 64131	SLMBN program support	PC	1,300,000.00
06/17/2022	Jerusalem Farm	520 Garfield Ave Kansas City, MO 64124	Home Repair and Community Project Capacity	PC	125,000.00
06/17/2022	Community Capital Fund	3200 Wayne Avenue Kansas City, MO 64109	Capacity Building and New Product Development	PC	375,000.00
06/17/2022	Credit & Homeownership Empowerment Serv	3125 Gillham Plaza Kansas City, MO 64109	Financial and Asset Building Program	PC	275,000.00
07/20/2022	Jerusalem Farm	520 Garfield Ave Kansas City, MO 64124	Community listening project/coordinating affordable housing stakeholders	PC	55,000.00
07/20/2022	Trust Neighborhoods	1000 Walnut St, Ste 1550 Kansas City, MO 64106	Lykins Neighborhood Trust Phase I Expansion	PC	350,000.00
07/20/2022	Pete's Garden	6215 Summit St Kansas City, MO 64113	Food recovery expansion and scale-up	PC	125,000.00
07/20/2022	EPEC	5825 TROOST AVENUE, Ste B KANSAS CITY, MO 64110	EPEC Capital Campaign	PC	150,000.00
07/20/2022	Folly Theater	PO BOX 26505 KANSAS CITY, MO 64196	"Revitalizing the Folly": Phase II - Folly 2020 Capital Campaign	PC	100,000.00
07/20/2022	Footprints, Inc.	2017 E Linwood Blvd Kansas City, MO 64109	Heros Home Gate Expansion	PC	100,000.00
07/20/2022	MINDDRIVE, Inc.	2615 Holmes Kansas City, MO 64108	Capacity building	PC	150,000.00
07/20/2022	Rockhurst University	1100 Rockhurst Road Kansas City, MO 64110	Academic Advising & Degree Audit Tools for Student Success	PC	230,000.00
07/20/2022	Swope Health Services	3801 Dr. Martin Luther King, Jr. Blvd Kansas City, MO 64130	PACE KC Adult Wellness Center Capital Campaign	PC	250,000.00
07/20/2022	Visiting Nurses Association	1500 Meadow Lake Pkwy Kansas City, MO 64114-1600	VNA Administration Office Construction	PC	100,000.00
07/20/2022	Jewish Federation of Greater KC	8800 W 103rd Street Overland Park, KS 66212-4283	Anna and Max Zalcmn Learning Center Ongoing programs and operations	PC	5,000.00
07/20/2022	Hyman Brand Hebrew Academy	5801 West 115th Street, Ste 102 Overland Park, KS 66211-1800	Ongoing programs and operations	PC	107,000.00
07/20/2022	Jewish Community Center Of Greater	5801 W 115th Street, Overland Park, KS 66211-1800	Ongoing programs and operations	PC	10,000.00
07/20/2022	Avodah	125 Maiden Lane, #8B New York, NY 10038-5041	Millennial engagement for Avodah Kansas City	PC	6,000.00
07/20/2022	Jewish Family Services	5801 W. 115th Street, Ste 103 Overland Park, KS 66211-1800	Ongoing programs and operations	PC	25,000.00

Date	Name	Address	Purpose of Grant	Foundation Status	Amount of Grant Paid
07/20/2022	Jewish Vocational Service	4600 Paseo Blvd Kansas City, MO 64110-1826	Ongoing programs and operations	PC	5,000.00
07/20/2022	Midwest Center For Holocaust	5801 W 115th Street, Ste 106 Overland Park, KS 66211-1800	Ongoing programs and operations	PC	8,000.00
07/20/2022	Jewish Federation of Greater KC	5801 W. 115th Street, Ste 201 Overland Park, KS 66211-1800	Sasone Committee Ongoing programs and operations	PC	10,000.00
07/20/2022	Vaad Hakashruth Of Kansas City	9900 Antioch Rd Overland Park, KS 66212	Ongoing programs and operations	PC	4,000.00
07/20/2022	Village Shalom, inc.	5500 W. 123rd Street Overland Park, KS 66209-3193	Ongoing programs and operations	PC	30,000.00
07/20/2022	Jewish Federation of Greater KC	5801 W 115th Street, Ste 201 Overland Park, KS 66211-1800	Improving critical security measure at the Jewish Community Campus	PC	50,000.00
07/20/2022	The Temple, Congregation B'nai Jehudah	12320 Nall Ave Overland Park, KS 66209	Matching gift	PC	754.00
07/20/2022	MOCSA	3100 Broadway, Ste 400 Kansas City, MO 64111	Matching gift	PC	2,500.00
08/04/2022	UMKC Foundation	5115 Oak Street 202 Administrative Center Kansas City, MO 64112	Bloch Scholars student support services	PC	45,000.00
09/06/2022	JCRB-American Jewish Committee	5801 W 115th, Ste 203 Overland Park, KS 66211	Ongoing program and operations	PC	40,000.00
09/06/2022	Miracle Of Innocence Inc	13725 Metcalf, Ste 285 Overland Park, KS 66223	Matching gift	PC	3,000.00
09/06/2022	Saint Luke's Foundation	901 E. 104th Street, Mail Stop 1005 Kansas City, MO 64131	Matching gift	PC	10,000.00
09/06/2022	War Horses for Veterans	5600 W 183rd St Stilwell, KS 66085	Matching gift	PC	1,500.00
09/06/2022	Children's Mercy Hospital	2401 Gillham Rd Kansas City, MO 64108-4619	Matching gift	PC	1,000.00
09/06/2022	Jewish Family Services	5801 W. 115th Street , Ste 103 Overland Park, KS 66211-1800	Matching gift	PC	1,000.00
09/06/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	Matching gift	PC	1,250.00
09/06/2022	JCRB-American Jewish Committee	5801 W 115th, Ste 203 Overland Park, KS 66211	Matching gift	PC	1,750.00
09/06/2022	Elmwood Cemetary Society	4900 E Truman Rd Kansas City, MO 64127	Chapel and restrooms renovations	PC	2,500.00
09/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Hall Charitable Fund	PC	15,000.00
09/20/2022	Kansas City Public School Education Found	2923 Troost Ave, Kansas City, MO 64109	Hiring an additional Asst Superintendent	PC	184,000.00
09/20/2022	Liberty Memorial Association	2 MEMORIAL DRIVE KANSAS CITY, MO 64108-4603	National WWI Museum and Memorial Collections Digitization	PC	125,000.00
09/20/2022	Reconciliation Services	3101 Troost Avenue Kansas City, MO 64109	Reveal Strength Campaign	PC	75,000.00
09/20/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	Matching gift	PC	3,400.00
10/02/2022	Jewish Family Services	5801 W. 115th Street , Ste 103 Overland Park, KS 66211-1800	Strategic Capacity and Growth Initiatives	PC	330,000.00
10/02/2022	Prairie Excellence in Education Fund Inc	6642 Mission Rd Prairie Village, KS 66208-1701	Matching gift	PC	400.00
10/02/2022	Lyric Opera of Kansas City Inc	1725 Holmes Street Kansas City, MO 64108	Matching gift	PC	2,500.00
10/02/2022	New Reform Temple	7100 Main Kansas City, MO 64114	Matching gift	PC	5,000.00
10/02/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	Matching gift	PC	2,500.00
10/02/2022	Pembroke Hill School	400 W. 51st Street Kansas City, MO 64112-2316	Matching gift	PC	2,500.00
10/02/2022	Jewish Federation of Greater KC	5801 W 115th Street, Ste 201 Overland Park, KS 66211-1800	Matching gift	PC	2,500.00
10/19/2022	Jewish Community Foundation Of Greater KC	5801 W 115TH ST., STE 104 OVERLAND PARK, KS 66211	Matching gift	PC	15,000.00
10/20/2022	Children's Mercy Hospital	2401 Gillham Rd Kansas City, MO 64108-4619	Health Care Equity for Kansas City Kids	PC	2,000,000.00
10/20/2022	Credit & Homeownership Empowerment Serv	3125 Gillham Plaza Kansas City, MO 64109	Rook Capital Community Developmopment Financial Intermediary	PC	150,000.00
10/20/2022	Literacy Kansas City	3036 Troost Avenue Kansas City, MO 64109-1539	Workforce Development and Adult Education	PC	400,000.00
10/20/2022	United Way Of Greater Kansas City	801 W 47th Street, Ste 500 Kansas City, MO 64113	Direct Assistance to Households and Food Pantries	PC	1,000,000.00
10/20/2022	Jewish Federation of Greater KC	5801 W 115th Street, Ste 201 Overland Park, KS 66211-1800	See KC	PC	100,000.00
10/20/2022	Generating Income for Tomorrow	5008 Prospect Ave Kansas City, MO 64130	Business Center Pilot	PC	150,000.00
10/20/2022	High Aspirations	6320 Brookside Plaza, Suite 263 Kansas City, MO 64108	Additional Staff and Marketing Support	PC	50,000.00
10/20/2022	Tri-County Community Mental Health Servc	3100 NE 83rd St Kansas City, MO 64105	Capital Improvements for Northland Human Services	PC	100,000.00
10/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Matching gift	PC	15,000.00
11/08/2022	Kansas City Repertory Theatre	4825 Troost Ave., Suite 106 Kansas City, MO 64110	Matching gift	PC	1,700.00
11/08/2022	Saint Luke's Foundation	901 E. 104th Street, Mail Stop 1005 Kansas City, MO 64131	Matching gift	PC	2,000.00
11/08/2022	LevellUp Kids	5418 NE Antioch Road Kansas City, MO 64119-2507	Matching gift	PC	250.00
11/08/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	Supporting Activation and Audience Engagement	PC	441,666.00
11/08/2022	UMKC Foundation	5115 Oak Street 202 Administrative Center Kansas City, MO 64112	Gift Fees for MHBFF 2022 Payments	PC	800.00

Date	Name	Address	Purpose of Grant	Foundation Status	Amount of Grant Paid
11/08/2022	International Relations Council	30 W. Pershing Road Suite 201 Kansas City, MO 64108-2457	Matching gift	PC	2,000.00
11/08/2022	American Public Square	300 E 39th St, #4F Kansas City, MO 64111	Matching gift	PC	1,000.00
11/08/2022	UMKC - Linda Hall Library	5109 Cherry St Kansas City, MO 64110-2498	Matching gift	PC	1,350.00
11/08/2022	Mission Vision	PO Box 32134 Kansas City, MO 64171-5134	Matching gift	PC	1,000.00
11/08/2022	Edgar Snow Memorial Fund	2501 Holmes Street Kansas City, MO 64108	Matching gift	PC	1,000.00
11/09/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Support the Henry W. Bloch School of Management Fund	PC	2,000,000.00
11/21/2022	The Nelson Gallery Foundation	4525 Oak Street Kansas City, MO 64111-1818	Matching gift	PC	2,000.00
11/21/2022	High Aspirations	6320 Brookside Plaza, Suite 263 Kansas City, MO 64108	Matching gift	PC	1,500.00
11/21/2022	Kansas University Endowment Assoc	3901 Rainbow Blvd., Mailstop 3012 Kansas City, KS 66160	Matching gift	PC	5,000.00
12/05/2022	Jewish Federation of Greater KC	5801 W 115th Street, Ste 201 Overland Park, KS 66211-1800	Ongoing programs and operations	PC	250,000.00
12/05/2022	Friends of Lakeside Nature Center	4701 E Gregory Blvd Kansas City, MO 64132	Matching gift	PC	100.00
12/05/2022	Bishop Miege High School	5041 Reinhardt Drive Shawnee Mission, KS 66205	Matching gift	PC	1,000.00
12/05/2022	Arts Engagement Foundation of Kansas City	20 E. Gregory Blvd Kansas City, MO 64114	Matching gift	PC	50.00
12/20/2022	Saint Luke's Foundation	901 E. 104th Street, Mail Stop 1005 Kansas City, MO 64131	For use and benefit of SLMBNI	PC	1,300,000.00
12/20/2022	Greater Kansas City Hispanic Development	1055 Broadway Blvd, Ste 130 Kansas City, MO 64105	Family College Prep Program	PC	450,000.00
12/20/2022	Marlborough Community Land Trust	1809 E 80th St Kansas City, MO 64132-3545	Operations and staff capacity	PC	75,000.00
12/20/2022	Arts KC-regional Arts Council	106 SOUTHWEST BOULEVARD KANSAS CITY, MO 64108-1924	Arts Connect Pilot Program	PC	300,000.00
12/20/2022	MARC Comm Serv Corp	600 Broadway Blvd, Ste 300 Kansas City, MO 64105-1554	Regional Housing Partnership	PC	560,000.00
12/20/2022	KC Unconquered	c/o Plexpd Westport 300 E 39th St, Suite 1G Kansas City, MO 64111	KC Unconquered Northeast initiative	PC	500,000.00
12/20/2022	Bishop Ward High School	708 North 18th Street Kansas City, KS 66102	St Jerome Media Center	PC	125,000.00
12/20/2022	Cornerstones of Care	300 E 36th St Kansas City, MO 64111	Residential Treatment Program Support	PC	150,000.00
12/20/2022	Emmanuel Family & Child Dev Center	4736 Prospect Ave Kansas City, MO 64130	Teacher Recruitment and Training	PC	250,000.00
12/20/2022	Healing House Inc	4505 St. John Avenue Kansas City, MO 64123	Original Hall Renovation	PC	150,000.00
12/20/2022	Instruction Partners	604 Gallatin Ave Ste 202 Nashville, TN 37206	Instructional leader support at Gladstone Elementary	PC	150,000.00
12/20/2022	Kansas City Teacher Residency	1712 Main St, Suite 200 Kansas City, MO 64108	KCTR Teacher Fellows Program	PC	200,000.00
12/20/2022	KidsTLC Inc.	480 S Rogers Road Olathe, KS 66062	Rooted in Hope Capital Campaign	PC	150,000.00
12/20/2022	Lyric Opera of Kansas City Inc	1725 Holmes Street Kansas City, MO 64108	Education and Community Engagement Initiatives	PC	120,000.00
12/20/2022	The Rabbit Hole KC	919 E 14th Ave Kansas City, MO 64116	The Campaign for the Rabbit hole	PC	250,000.00
12/20/2022	Union Station Kansas City, Inc.	30 W Pershing Rd., Suite 400 Kansas City, MO 64108	Science City Exhibition Renovation	PC	250,000.00
12/20/2022	Vibrant Health	21 N 12th Street, Ste 300 Kansas City, KS 66102-5105	Acquisition and integration of Family Health Care	PC	100,000.00
12/20/2022	Children's Mercy Hospital	2401 Gillham Rd Kansas City, MO 64108-4619	Matching gift	PC	5,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	SLMBNI/ Neurosurgery Residency Program	PC	1,500,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Henry W. Bloch School of Mgmt Fund/support for Bloch School 2023	PC	4,000,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Bloch Art Fund/art acquisition strategy	PC	1,000,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Marion and Henry Bloch Scholars Fund for Donnelly College	PC	1,000,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Marion and Henry Bloch Scholars Fund for MCC	PC	600,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	Marion and Henry Bloch Scholars Fund for Rockhurst Univ	PC	2,400,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105	South Loop Link Park Fund	PC	2,670,000.00
12/20/2022	Greater Kansas City Community Foundation	1055 Broadway Blvd, Suite 130 Kansas City, MO 64105			32,002,603.00

Marion and Henry Bloch Family Foundation
FORM 990-PF, LINE 13
OTHER INVESTMENT VALUES
December 31, 2022

EIN: 45-4047901

	Beginning Book Value	Ending Book Value	Market Value
Schwab Vanguard Interterm	33,792,083	40,922,910	40,922,910
Schwab-Vanguard Developed M	17,668,652	16,844,850	16,844,850
Schwab-Vanguard Russell 3000	61,337,787	76,822,934	76,822,934
Schwab-Vanguard Russell 1000	22,642,659	-	-
Schwab-GMO Climate Change Fund	5,575,956	5,482,847	5,482,847
Schwab-Lazard	7,909,830	5,046,554	5,046,554
Schwab-T Rowe Price New Era	9,884,029	8,391,545	8,391,545
Fixed Income Invest - Commerce	14,198,377	-	-
PIMCO Income Funds Ins	25,356,369	11,117,161	11,117,161
iShare Core S&P Mid-Cap	15,288,302	-	-
Schwab-Vanguard Emerg Mkts Stk	491,583	1,628,546	1,628,546
Vanguard Real Estate Ind	10,256,271	7,569,615	7,569,615
Principal Diversified Real	-	5,587,295	5,587,295
Wellington CTF Durable	22,476,771	24,650,912	24,650,912
Loomis Sayles	15,338,294	10,687,332	10,687,332
1607 Capital	-	14,643,704	14,643,704
Durable Capital Onshore C-1	19,145,187	12,050,705	12,050,705
Durable Capital Onshore B	-	1,933,696	1,933,696
VVP All Cap Fund	23,931,109	15,645,342	15,645,342
Crescent Direct Lending III	2,308,714	5,627,809	5,627,809
RWC Horizon Equity Fund Ltd	27,397,065	-	-
Global Research Equity	29,902,040	25,340,771	25,340,771
Ryder Court Intl Select	-	10,186,857	10,186,857
Baupost Value Partners	7,756,669	5,033,476	5,033,476
Dover Street IX	3,251,296	2,480,872	2,480,872
Dover Street X	6,078,085	7,646,887	7,646,887
Brookfield Capital Fund V	3,502,796	4,327,980	4,327,980
Wingate Partners	2,036,659	2,040,370	2,040,370
Oakwood RE Partners III	2,583,992	1,779,540	1,779,540
Mountain Capital Partners II	765,660	675,736	675,736
RiverVest Venture IV	3,229,778	3,437,534	3,437,534
RiverVest Venture V	1,392,365	1,975,433	1,975,433
Oakwood RE Partners	881,043	926,743	926,743
CID Capital II	2,711,251	2,239,036	2,239,036
RiverVest Venture III	2,868,642	1,795,252	1,795,252
Oakwood RE Partners II	1,267,428	962,865	962,865
Renaissance Instit Equities	18,794,842	11,888,011	11,888,011
Transom Capital Fund III	1,419,846	2,036,691	2,036,691
WGI Emerging Markets Small	7,683,939	7,394,115	7,394,115
Taconic Opportunity Offshore	11,853,102	11,543,134	11,543,134
Varde Investment Ptrs	12,567,145	11,822,470	11,822,470
Littlejohn Opportunities Fund	3,498,506	2,850,829	2,850,829
Parametric Global Equity	13,423,552	5,099,487	5,099,487
Artemis Real Estate	2,069,952	1,505,154	1,505,154
HBK Multi Strategy	12,825,207	9,882,225	9,882,225
Roark Capital II	3,119,011	3,160,995	3,160,995

SASOF OFFSHORE IV-CARLYLE AVIAT	1,089,360	685,156	685,156
BLACK BAY ENERGY LP	2,455,455	2,364,958	2,364,958
AXIOM ASIA IV	6,066,120	4,553,351	4,553,351
JUNIPERUS INSURANCE OPPORTUNITY	7,995,578	7,412,665	7,412,665
ROARK V	2,150,032	2,357,241	2,357,241
AXIOM ASIA V	2,885,319	2,974,056	2,974,056
ARROWSTREET CAPITAL	33,660,360	22,903,630	22,903,630
ADV OPPORTUNITIES FUND II	2,861,277	3,002,301	3,002,301
JMI EQUITY FUND IX-B	4,110,771	4,290,768	4,290,768
WILSQUARE CAPITAL II	1,812,823	2,289,224	2,289,224
DW HEALTHCARE PARTNERS V	1,362,802	1,879,967	1,879,967
JMI EQUITY FUND X-B	3,003,746	5,047,923	5,047,923
WYNNCHURCH CAPITAL	1,404,171	2,685,587	2,685,587
ARROWSTREET CAPITAL 2021-03	4,109,639	3,738,737	3,738,737
ARROWSTREET CAPITAL 2022-06	-	2,796,776	2,796,776
HOSEN PRIVATE EQUITY III	2,616,270	3,618,425	3,618,425
ENCAP INVESTMENTS	1,838,144	3,125,338	3,125,338
AXIOM ASIA VI	1,310,918	2,288,368	2,288,368
KLINE HILL	-	2,430,309	2,430,309
STRATEGIC INVESTORS FUND X	4,557,279	5,677,475	5,677,475
HIGHCLERE INTL	15,537,747	-	-
WARREN EQUITY PARTNERS FUND III	3,119,480	5,185,612	5,185,612
GREEN COURT GREATER CHINA LONG	15,576,247	9,533,697	9,533,697
FIVE ELMS V	438,346	2,779,757	2,779,757
RECOGNIZE PARTNERS I-A, LP	408,988	1,504,738	1,504,738
LEVEL EQUITY GROWTH PTNRS V	360,272	971,467	971,467
LEVEL EQUITY OPPORTUNITIES FUND	(562)	759,166	759,166
GAOCHENG CAPITAL	-	528,642	528,642
STRATEGIC INVESTORS FUND XI	-	581,217	581,217
HUDSON BAY INTERNATIONAL FUND	9,604,417	9,914,717	9,914,717
GENERATION IM GLOBAL EQUITY	19,733,273	14,222,342	14,222,342
CASH-COMMERCE CUSTODY PAR	5,515,064	1,278,621	1,278,621
LIMITED PARTNERSHIPS-COST	471,316	445,067	445,067
UNREAL G(L) LIMITED PARTNERSHIP	1,500	79,232	79,232
PARAMETRIC GLOBAL EQTY FUTURES	227,548	476,462	476,462
UNREAL G(L) PARAMETRIC FUTURES	72,672	(153,017)	(153,017)
	646,838,216	536,916,195	536,916,195