

## Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

2024

Open to Public  
Inspection

|  |   |
|--|---|
| <b>A</b> For the 2024 calendar year, or tax year beginning , 2024, and ending , 20   |   |
| <b>B</b> Check if applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return/terminated<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | <b>C</b> Name of organization NATIONAL TROPICAL BOTANICAL GARDEN<br>Doing business as<br>Number and street (or P.O. box if mail is not delivered to street address) Room/suite<br>3530 PAPALINA ROAD<br>City or town, state or province, country, and ZIP or foreign postal code<br>KALAHEO, HI 96741<br><b>F</b> Name and address of principal officer:<br>JANET MAYFIELD, 3530 PAPALINA RD, KALAHEO, HI 96741<br><b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br><b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If "No," attach a list. See instructions.<br><b>H(c)</b> Group exemption number |
| <b>D</b> Employer identification number<br>52-6057064<br><b>E</b> Telephone number<br>(808) 332-7324<br><b>G</b> Gross receipts \$40,965,413.  | <b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527<br><b>J</b> Website: WWW.NTBG.ORG<br><b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other<br><b>L</b> Year of formation: 1964<br><b>M</b> State of legal domicile: HI   |

## Part I Summary

|   |   |                           |              |
|---|---|---------------------------|--------------|
| Activities & Governance   | <b>1</b> Briefly describe the organization's mission or most significant activities:<br>TO ENRICH LIFE BY PERPETUATING TROPICAL PLANTS, ECOSYSTEMS AND CULTURAL HERITAGE THROUGH DISCOVERY, SCIENTIFIC RESEARCH, CONSERVATION, AND EDUCATION. |                           |              |
|   | <b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.  |                           |              |
|   | <b>3</b> Number of voting members of the governing body (Part VI, line 1a) . . . . .  | <b>3</b>                  | 25           |
|   | <b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) . . . . .  | <b>4</b>                  | 25           |
|   | <b>5</b> Total number of individuals employed in calendar year 2024 (Part V, line 2a) . . . . .   | <b>5</b>                  | 171          |
|   | <b>6</b> Total number of volunteers (estimate if necessary) . . . . .   | <b>6</b>                  | 444          |
|   | <b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 . . . . .  | <b>7a</b>                 | 0.           |
| <b>b</b> Net unrelated business taxable income from Form 990-T, Part I, line 11 . . . . . | <b>7b</b>   | 0.                        |              |
| Revenue   | <b>8</b> Contributions and grants (Part VIII, line 1h) . . . . .  | Prior Year                | Current Year |
|   | <b>9</b> Program service revenue (Part VIII, line 2g) . . . . .   | 5,073,047.                | 19,675,335.  |
|   | <b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) . . . . .   | 5,488,688.                | 6,091,474.   |
|   | <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) . . . . .  | 1,541,270.                | 2,599,535.   |
|   | <b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) . . . . .  | 829,785.                  | 801,449.     |
|   |   | 12,932,790.               | 29,167,793.  |
| Expenses  | <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1–3) . . . . .  |                           | 37,000.      |
|   | <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) . . . . .   |                           |              |
|   | <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10) . . . . .   | 8,202,907.                | 8,796,397.   |
|   | <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) . . . . .  |                           |              |
|   | <b>b</b> Total fundraising expenses (Part IX, column (D), line 25) . . . . .  | 747,127.                  |              |
|   | <b>17</b> Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e) . . . . .  | 5,428,840.                | 5,584,146.   |
|   | <b>18</b> Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) . . . . .   | 13,631,747.               | 14,417,543.  |
| <b>19</b> Revenue less expenses. Subtract line 18 from line 12 . . . . .                  | -698,957.   | 14,750,250.               |              |
| Net Assets or Fund Balances   | <b>20</b> Total assets (Part X, line 16) . . . . .  | Beginning of Current Year | End of Year  |
|   | <b>21</b> Total liabilities (Part X, line 26) . . . . .   | 81,941,242.               | 98,830,821.  |
|   | <b>22</b> Net assets or fund balances. Subtract line 21 from line 20 . . . . .  | 1,764,119.                | 1,778,468.   |
|   |   | 80,177,123.               | 97,052,353.  |

## Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge.

Sign  
Here

Signature of officer

Date

11/07/2025

Tamara A Rollins, CFO

Type or print name and title

Paid  
Preparer  
Use Only

Preparer's name

Preparer's signature

Date

Check ☐ if  
self-employed

PTIN

Firm's name

Firm's EIN

Firm's address

Phone no.

Self-Prepared

May the IRS discuss this return with the preparer shown above? See instructions ☐ Yes ☒ No

For Paperwork Reduction Act Notice, see the separate instructions. BAA

Cat. No. 11282Y

REV 09/03/25 PRO

Form 990 (2024)

**Part III** Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☐

- 1** Briefly describe the organization's mission:  
TO ENRICH LIFE BY PERPETUATING TROPICAL PLANTS, ECOSYSTEMS AND  
CULTURAL HERITAGE THROUGH DISCOVERY, SCIENTIFIC RESEARCH,  
CONSERVATION, AND EDUCATION.
- 2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No  
 If "Yes," describe these new services on Schedule O.
- 3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No  
 If "Yes," describe these changes on Schedule O.
- 4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ 5,754,435. including grants of \$ 0.) (Revenue \$ 2,358,280.)  
LIVING COLLECTIONS: NTBG'S GARDENS & PRESERVES ARE SAFE HavENS FOR AT-RISK SPECIES THAT OTHERWISE MIGHT DISAPPEAR FOREVER. 140 ACRES ARE FORMALLY MAINTAINED.  
NTBG'S COLLECTIONS ENCOMPASS 127K LIVING PLANTS, REPRESENTING 3,133 SPECIES AND 3,726 DISTINCT TAXA.  
THE STAFF AT NTBG'S HORTICULTURAL CENTER & NURSERIES GROW AND SAFEGUARD RARE & ENDANGERED PLANTS FROM HAWAII & OTHER PACIFIC ISLANDS.  
MANY SPECIES THAT ARE ALMOST EXTINCT IN NATURE HAVE BEEN REINTRODUCED TO THEIR HABITAT BY NTBG'S BOTANISTS.  
NTBG'S COLLECTIONS ARE STUDIED BY VISITING SCHOLARS, RESERCHERS & STUDENTS FROM AROUND THE WORLD.  
NTBG'S GARDEN IN FLORIDA, THE KAMPONG, IS THE FORMER ESTATE OF DR. DAVID FAIRCHILD, THE FAMED BOTANICAL EXPLORER.  
OUR GARDEN IN MAUI, KAHANU GARDEN, IS HOME TO THE PI'ILANIHALE HEIAU, BELIEVED TO BE THE LARGEST ANCIENT MAN-MADE  
STRUCTURE IN POLYNESIA.

**4b** (Code: ) (Expenses \$ 3,124,036. including grants of \$ 0.) (Revenue \$ 2,360,595.)  
SCIENCE & CONSERVATION: THIS PROGRAM IS FOCUSED ON PROTECTING & CONSERVING TROPICAL PLANTS.  
OUR FIELD BOTANISTS SURVEY MANY AREAS IN HAWAII TO ASSESS THREATS TO NATIVE SPECIES & COLLECT  
SEEDS & CUTTINGS FOR PROPOGATION, & ARE EITHER OUTPLANTED, PRESERVED IN THE HERBARIUM OR PLACED IN SEED STORAGE.  
NTBG'S SEED BANK CONTAINS MORE THAN 18.5 MILLION SEEDS OF MORE THAN 943 TAXA. THE BOTANICAL RESEARCH CENTER IS THE HOME FOR THE GARDEN'S  
HERBARIUM, SEED BANK & A RARE BOOK LIBRARY THAT IS TEMPERATURE & HUMIDITY CONTROLLED & HOLDS OVER 1,200 VOLUMES  
OF BOOKS-SOME THAT DATE BACK TO THE 1500'S. THESE COLLECTIONS ARE CRUCIAL FOR OUR RESEARCH, PUBLICATIONS AND EDUCATIONAL PROGRAMS.  
THE GARDEN'S BREADFRUIT INSTITUTE MANAGES THE LARGEST & MOST DIVERSE COLLECTION OF BREADFRUIT SPECIES & VARIETIES IN THE WORLD,  
WITH OVER 120 VARIETIES CONSERVED IN FIELD GENE BANKS. THE INSTITUTE PROMOTES THE CONSERVATION & USE OF BREADFRUIT  
FOR FOOD SECURITY, AGRICULTURAL SUSTAINABILITY & ECONOMIC DEVELOPMENT. NTBG IS ALSO A COLLABORATIVE PARTNER  
WITH FIU IN THE DEVELOPMENT OF THE INTERNATIONAL CENTER FOR TROPICAL BOTANY IN FLORIDA.  
THE CENTER IS DESIGNED TO EDUCATE & BRING TOGETHER BOTANISTS FROM AROUND THE WORLD TO SHARE KNOWLEDGE.

**4c** (Code: ) (Expenses \$ 3,102,820. including grants of \$ 37,000.) (Revenue \$ 5,130,335.)  
EDUCATION: NTBG BELIEVES THAT EDUCATION IS KEY FOR PRESERVATION OF TROPICAL PLANTS & ECOSYSTEMS. TOURS ARE OFFERED THROUGH  
ITS GARDENS TO EDUCATE THE GENERAL PUBLIC ABOUT THE NEED TO PRESERVE TROPICAL FORESTS RICH WITH NATIVE BIODIVERSITY  
AND TO PROTECT OUR ECOSYSTEMS & RESOURCES THAT WE RELY ON FOR OUR OWN WELL-BEING. IN 2024, OUR BOTANICAL GARDENS  
HAD 110,379 VISITORS FROM AROUND THE WORLD. OTHER EDUCATIONAL ACTIVITIES INCLUDE FORMAL AND INFORMAL  
LECTURES, BOTANICAL ILLUSTRATOR COURSES, INTERNSHIPS & WORKSHOPS FOR COLLEGE PROFESSORS,  
HIGH SCHOOL TEACHERS & ENVIRONMENTAL JOURNALISTS. SCIENCE STAFF REGULARLY PROVIDE ARTICLES IN  
SCIENTIFIC PUBLICATIONS. THE SCIENCE STAFF HAVE COLLABORATED ON & PUBLISHED SEVERAL BOOKS ON TROPICAL FLORA.  
THE LOY MCCANDLESS MARKS BOTANICAL LIBRARY CURRENTLY HOLDS OVER 20,000 VOLUMES, 3,000 ORIGINAL BOTANICAL  
ARTWORKS & PRINTS, 6,000 PHOTOGRAPHS & 16,000 COLOR SLIDES. THE LIBRARY COMPRISES ONE OF THE FINEST  
COLLECTIONS OF TROPICAL BOTANICAL & HORTICULTURAL REFERENCE COLLECTIONS IN THE PACIFIC BASIN.  
See Part III, Ln 4c statement

**4d** Other program services (Describe on Schedule O.)  
 (Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses 11,981,291.

**Part IV Checklist of Required Schedules**

|  | Yes          | No |
|--|--------------|----|
| <b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A . . . . .   | <b>1</b> X   |    |
| <b>2</b> Is the organization required to complete Schedule B, Schedule of Contributors? See instructions . . . . .   | <b>2</b> X   |    |
| <b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I . . . . .  | <b>3</b>     | X  |
| <b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II . . . . .   | <b>4</b>     | X  |
| <b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III . . . . .  | <b>5</b>     | X  |
| <b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I . . . . .  | <b>6</b>     | X  |
| <b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II . . . . .  | <b>7</b> X   |    |
| <b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III . . . . .   | <b>8</b> X   |    |
| <b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV . . . . .            | <b>9</b>     | X  |
| <b>10</b> Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? If "Yes," complete Schedule D, Part V . . . . .   | <b>10</b> X  |    |
| <b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.   |              |    |
| <b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI . . . . .   | <b>11a</b> X |    |
| <b>b</b> Did the organization report an amount for investments—other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII . . . . .  | <b>11b</b>   | X  |
| <b>c</b> Did the organization report an amount for investments—program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII . . . . .  | <b>11c</b>   | X  |
| <b>d</b> Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX . . . . .   | <b>11d</b> X |    |
| <b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X . . . . .   | <b>11e</b> X |    |
| <b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X . . . . .  | <b>11f</b> X |    |
| <b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII . . . . .  | <b>12a</b> X |    |
| <b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional . . . . .   | <b>12b</b>   | X  |
| <b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E . . . . .  | <b>13</b>    | X  |
| <b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? . . . . .   | <b>14a</b>   | X  |
| <b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV . . . . . | <b>14b</b>   | X  |
| <b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV . . . . .   | <b>15</b>    | X  |
| <b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV . . . . .   | <b>16</b>    | X  |
| <b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions . . . . .   | <b>17</b>    | X  |
| <b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II . . . . .   | <b>18</b> X  |    |
| <b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III . . . . .   | <b>19</b>    | X  |
| <b>20a</b> Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H . . . . .   | <b>20a</b>   | X  |
| <b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .  | <b>20b</b>   |    |
| <b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II . . . . .  | <b>21</b> X  |    |

**Part IV Checklist of Required Schedules** (continued)

|  | Yes          | No |
|--|--------------|----|
| <b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III . . . . .  | <b>22</b> x  |    |
| <b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J . . . . .  | <b>23</b> x  |    |
| <b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a . . . . .  | <b>24a</b>   | x  |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .   | <b>24b</b>   |    |
| <b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .  | <b>24c</b>   |    |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .   | <b>24d</b>   |    |
| <b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I . . . . .   | <b>25a</b>   | x  |
| <b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I . . . . .   | <b>25b</b>   | x  |
| <b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II . . . . .   | <b>26</b>    | x  |
| <b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III . . . . . | <b>27</b>    | x  |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions).  |              |    |
| <b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV . . . . .  | <b>28a</b>   | x  |
| <b>b</b> A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV . . . . .   | <b>28b</b>   | x  |
| <b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV . . . . .  | <b>28c</b>   | x  |
| <b>29</b> Did the organization receive more than \$25,000 in noncash contributions? If "Yes," complete Schedule M . . . . .  | <b>29</b> x  |    |
| <b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M . . . . .   | <b>30</b>    | x  |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I . . . . .   | <b>31</b>    | x  |
| <b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II . . . . .   | <b>32</b>    | x  |
| <b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I . . . . .   | <b>33</b>    | x  |
| <b>34</b> Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 . . . . .   | <b>34</b> x  |    |
| <b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .   | <b>35a</b> x |    |
| <b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 . . . . .   | <b>35b</b> x |    |
| <b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 . . . . .  | <b>36</b>    | x  |
| <b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI . . . . .  | <b>37</b>    | x  |
| <b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O . . . . .  | <b>38</b> x  |    |

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V . . . . . ☐

|   | Yes          | No |
|---|--------------|----|
| <b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable . . . . .  | <b>1a</b> 93 |    |
| <b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable . . . . .  | <b>1b</b> 0  |    |
| <b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . . | <b>1c</b> x  |    |

| <b>Part V Statements Regarding Other IRS Filings and Tax Compliance</b> (continued) |  | Yes        | No  |
|---|--|------------|-----|
| <b>2a</b>   | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return  | <b>2a</b>  | 171 |
| <b>b</b>  | If at least one is reported on line 2a, did the organization file all required federal employment tax returns?   | <b>2b</b>  | X   |
| <b>3a</b>   | Did the organization have unrelated business gross income of \$1,000 or more during the year?  | <b>3a</b>  | X   |
| <b>b</b>  | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O  | <b>3b</b>  |     |
| <b>4a</b>   | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?     | <b>4a</b>  | X   |
| <b>b</b>  | If "Yes," enter the name of the foreign country<br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).   |            |     |
| <b>5a</b>   | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  | <b>5a</b>  | X   |
| <b>b</b>  | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?   | <b>5b</b>  | X   |
| <b>c</b>  | If "Yes" to line 5a or 5b, did the organization file Form 8886-T?  | <b>5c</b>  |     |
| <b>6a</b>   | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?  | <b>6a</b>  | X   |
| <b>b</b>  | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  | <b>6b</b>  |     |
| <b>7</b>  | <b>Organizations that may receive deductible contributions under section 170(c).</b>   |            |     |
| <b>a</b>  | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?  | <b>7a</b>  | X   |
| <b>b</b>  | If "Yes," did the organization notify the donor of the value of the goods or services provided?  | <b>7b</b>  | X   |
| <b>c</b>  | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?   | <b>7c</b>  | X   |
| <b>d</b>  | If "Yes," indicate the number of Forms 8282 filed during the year  | <b>7d</b>  |     |
| <b>e</b>  | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  | <b>7e</b>  | X   |
| <b>f</b>  | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?   | <b>7f</b>  | X   |
| <b>g</b>  | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?   | <b>7g</b>  |     |
| <b>h</b>  | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?   | <b>7h</b>  |     |
| <b>8</b>  | <b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?   | <b>8</b>   |     |
| <b>9</b>  | <b>Sponsoring organizations maintaining donor advised funds.</b>   |            |     |
| <b>a</b>  | Did the sponsoring organization make any taxable distributions under section 4966?   | <b>9a</b>  |     |
| <b>b</b>  | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  | <b>9b</b>  |     |
| <b>10</b>   | <b>Section 501(c)(7) organizations.</b> Enter:   |            |     |
| <b>a</b>  | Initiation fees and capital contributions included on Part VIII, line 12   | <b>10a</b> |     |
| <b>b</b>  | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  | <b>10b</b> |     |
| <b>11</b>   | <b>Section 501(c)(12) organizations.</b> Enter:  |            |     |
| <b>a</b>  | Gross income from members or shareholders  | <b>11a</b> |     |
| <b>b</b>  | Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)  | <b>11b</b> |     |
| <b>12a</b>  | <b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?  | <b>12a</b> |     |
| <b>b</b>  | If "Yes," enter the amount of tax-exempt interest received or accrued during the year  | <b>12b</b> |     |
| <b>13</b>   | <b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>  |            |     |
| <b>a</b>  | Is the organization licensed to issue qualified health plans in more than one state?<br><b>Note:</b> See the instructions for additional information the organization must report on Schedule O.   | <b>13a</b> |     |
| <b>b</b>  | Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans  | <b>13b</b> |     |
| <b>c</b>  | Enter the amount of reserves on hand   | <b>13c</b> |     |
| <b>14a</b>  | Did the organization receive any payments for indoor tanning services during the tax year?   | <b>14a</b> | X   |
| <b>b</b>  | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O  | <b>14b</b> |     |
| <b>15</b>   | Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?<br>If "Yes," see the instructions and file Form 4720, Schedule N.                   | <b>15</b>  | X   |
| <b>16</b>   | Is the organization an educational institution subject to the section 4968 excise tax on net investment income?<br>If "Yes," complete Form 4720, Schedule O.   | <b>16</b>  | X   |
| <b>17</b>   | <b>Section 501(c)(21) organizations.</b> Did the trust, or any disqualified or other person, engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953?<br>If "Yes," complete Form 6069. | <b>17</b>  |     |

**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions. Check if Schedule O contains a response or note to any line in this Part VI ☒

### Section A. Governing Body and Management

|  |              | Yes | No |
|--|--------------|-----|----|
| <b>1a</b> Enter the number of voting members of the governing body at the end of the tax year . . .  | <b>1a</b> 25 |     |    |
| If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.                    |              |     |    |
| <b>b</b> Enter the number of voting members included on line 1a, above, who are independent . . .  | <b>1b</b> 25 |     |    |
| <b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .   | <b>2</b>     |     | X  |
| <b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? . . . . . | <b>3</b>     |     | X  |
| <b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .  | <b>4</b>     |     | X  |
| <b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .  | <b>5</b>     |     | X  |
| <b>6</b> Did the organization have members or stockholders? . . . . .  | <b>6</b>     |     | X  |
| <b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .   | <b>7a</b>    |     | X  |
| <b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .   | <b>7b</b>    |     | X  |
| <b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:   |              |     |    |
| <b>a</b> The governing body? . . . . .   | <b>8a</b>    | X   |    |
| <b>b</b> Each committee with authority to act on behalf of the governing body? . . . . .   | <b>8b</b>    | X   |    |
| <b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O . . . . .      | <b>9</b>     |     | X  |

### Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

|   | Yes          | No |
|---|--------------|----|
| <b>10a</b> Did the organization have local chapters, branches, or affiliates? . . . . .   | <b>10a</b>   | X  |
| <b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . . . . .   | <b>10b</b>   |    |
| <b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . . . . .  | <b>11a</b> X |    |
| <b>b</b> Describe on Schedule O the process, if any, used by the organization to review this Form 990. . . . .  |              |    |
| <b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .  | <b>12a</b> X |    |
| <b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .  | <b>12b</b> X |    |
| <b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done . . . . .   | <b>12c</b> X |    |
| <b>13</b> Did the organization have a written whistleblower policy? . . . . .   | <b>13</b> X  |    |
| <b>14</b> Did the organization have a written document retention and destruction policy? . . . . .  | <b>14</b> X  |    |
| <b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?  |              |    |
| <b>a</b> The organization's CEO, Executive Director, or top management official . . . . .   | <b>15a</b> X |    |
| <b>b</b> Other officers or key employees of the organization . . . . .  | <b>15b</b>   | X  |
| If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.  |              |    |
| <b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .  | <b>16a</b>   | X  |
| <b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . . | <b>16b</b>   |    |

### Section C. Disclosure

**17** List the states with which a copy of this Form 990 is required to be filed. See Part VI, Line 17 stmt

**18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☒ Own website    ☐ Another's website    ☒ Upon request    ☐ Other (explain on Schedule O)

**19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records.  
 TAMARA ROLLINS, 3530 PAPALINA RD, KALAHEO, HI 96741 (808) 332-7324

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

| (A)<br>Name and title                             | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/ 1099-MISC/ 1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/ 1099-MISC/ 1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|---|--|--|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
|   |  | Individual trustee or director   | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |   |  |   |
| (1) DEVON ANGELINI<br>TRUSTEE                     | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (2) GORDON L. DEANE<br>CHAIRMAN                   | 2.00   | X  |                       | X       |              |                              |        | 0.  | 0.   | 0.  |
| (3) JAN D. ELLIOTT<br>SECRETARY                   | 1.00   | X  |                       | X       |              |                              |        | 0.  | 0.   | 0.  |
| (4) HARRIET FRAUNFELTER<br>TRUSTEE                | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (5) ADALINE H. FRELINGHUYSEN<br>TRUSTEE           | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (6) PETER C. GARDNER<br>TRUSTEE                   | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (7) EMERSON KNOWLES<br>TRUSTEE                    | 2.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (8) DR. LINFORD L. LOUGHHEED<br>TRUSTEE           | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (9) MERRILL L. MAGOWAN<br>TRUSTEE                 | 2.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (10) DAVID RAE<br>TRUSTEE                         | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (11) JOHN H. RASHFORD, PH.D.<br>TRUSTEE           | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (12) KATHERINE G. RICHARDSON<br>SENIOR VICE CHAIR | 2.00   | X  |                       | X       |              |                              |        | 0.  | 0.   | 0.  |
| (13) CYNTHIA SALLEY<br>TRUSTEE                    | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| (14) PATRICIA W. SHEEHAN<br>TRUSTEE               | 1.00   | X  |                       |         |              |                              |        | 0.  | 0.   | 0.  |

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

| (A)<br>Name and title  | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |                                     |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|--|--|-----------------------|-------------------------------------|--------------|------------------------------|--------|---|--|---|
|  |  | Individual trustee or director   | Institutional trustee | Officer                             | Key employee | Highest compensated employee | Former |   |  |   |
| (15) ANITA SEIPP<br>TRUSTEE                                    | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (16) CATHERINE TOPHAM<br>TRUSTEE                               | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (17) ROBERT D. WEIST<br>TRUSTEE                                | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (18) THOMAS D. HEWITT<br>PRIOR CHAIRMAN                        | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (19) MICHAEL N. ROSENBERG, DDS<br>TRUSTEE                      | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (20) ANNE G. EARHART<br>VICE CHAIR                             | 1.00   | <input checked="" type="checkbox"/>  |                       | <input checked="" type="checkbox"/> |              |                              |        | 0.  | 0.   | 0.  |
| (21) ELIZABETH E. MATTHEWS<br>TRUSTEE                          | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (22) CAROL DICKINSON<br>TRUSTEE                                | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (23) PHYLISS EVANS SWINDELLS<br>TRUSTEE                        | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (24) SAM 'OHU GON, III, PHD<br>TRUSTEE                         | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| (25) DR. CHRISTOPHER D. TURNER<br>TRUSTEE                      | 1.00   | <input checked="" type="checkbox"/>  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| <b>1b Subtotal</b>   |  |  |                       |                                     |              |                              |        | 0.  | 0.   | 0.  |
| <b>c Total from continuation sheets to Part VII, Section A</b> |  |  |                       |                                     |              |                              |        | 303,909.  | 0.   | 25,011.   |
| <b>d Total (add lines 1b and 1c)</b>                           |  |  |                       |                                     |              |                              |        | 303,909.  | 0.   | 25,011.   |

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **2**

**3** Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual **3**

**4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual **4**

**5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person **5**

|          | Yes                                 | No                                  |
|----------|-------------------------------------|-------------------------------------|
| <b>3</b> |                                     | <input checked="" type="checkbox"/> |
| <b>4</b> | <input checked="" type="checkbox"/> |                                     |
| <b>5</b> |                                     | <input checked="" type="checkbox"/> |

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A)<br>Name and business address                      | (B)<br>Description of services | (C)<br>Compensation |
|---|--------------------------------|---------------------|
| R HOEME CONTRUCTION, LLC, PO BOX 796, KOLOA, HI 96756 | CONSTRUCTION                   | 129,803.            |
|   |                                |                     |
|   |                                |                     |
|   |                                |                     |

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **1**



**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

|  |  |   |               | (A)<br>Total revenue          | (B)<br>Related or exempt<br>function revenue | (C)<br>Unrelated<br>business revenue | (D)<br>Revenue excluded<br>from tax under<br>sections 512-514 |
|--|--|---|---------------|-------------------------------|--|--------------------------------------|---|
| <b>Contributions, Gifts, Grants,<br/>and Other Similar Amounts</b> | <b>1a</b>  | Federated campaigns . . . . .   | <b>1a</b>     |                               |  |                                      |   |
|  | <b>b</b>   | Membership dues . . . . .   | <b>1b</b>     | 506,986.                      |  |                                      |   |
|  | <b>c</b>   | Fundraising events . . . . .  | <b>1c</b>     | 92,780.                       |  |                                      |   |
|  | <b>d</b>   | Related organizations . . . . .   | <b>1d</b>     |                               |  |                                      |   |
|  | <b>e</b>   | Government grants (contributions)   | <b>1e</b>     | 1,025,281.                    |  |                                      |   |
|  | <b>f</b>   | All other contributions, gifts, grants,<br>and similar amounts not included above   | <b>1f</b>     | 18,050,288.                   |  |                                      |   |
|  | <b>g</b>   | Noncash contributions included in<br>lines 1a-1f . . . . .  | <b>1g</b>     | \$1,005,538.                  |  |                                      |   |
|  | <b>h</b>   | <b>Total.</b> Add lines 1a-1f . . . . .   |               | 19,675,335.                   |  |                                      |   |
|  | <b>Program Service<br/>Revenue</b>               |   |               | Business Code                 |  |                                      |   |
| <b>2a</b>  |  | EDUCATIONAL TOURS   | 110000        | 3,979,264.                    | 3,979,264.                                   | 0.                                   | 0.  |
| <b>b</b>   |  | ALLERTON GARDEN REIMB & MGMT FEES   | 900099        | 1,367,310.                    | 1,367,310.                                   | 0.                                   | 0.  |
| <b>c</b>   |  | GOVERNMENT & OTHER CONTRACTS  | 900099        | 744,900.                      | 744,900.                                     | 0.                                   | 0.  |
| <b>d</b>   |  |   |               |                               |  |                                      |   |
| <b>e</b>   |  |   |               |                               |  |                                      |   |
| <b>f</b>   |  | All other program service revenue . . .   |               |                               |  |                                      |   |
| <b>g</b>   |  | <b>Total.</b> Add lines 2a-2f . . . . .   |               | 6,091,474.                    |  |                                      |   |
| <b>Other Revenue</b>   | <b>3</b>   | Investment income (including dividends, interest, and<br>other similar amounts) . . . . .   |               | 1,205,166.                    | 0.   | 0.                                   | 1,205,166.  |
|  | <b>4</b>   | Income from investment of tax-exempt bond proceeds  |               |                               |  |                                      |   |
|  | <b>5</b>   | Royalties . . . . .   |               |                               |  |                                      |   |
|  | <b>6a</b>  | Gross rents . . . . .   | <b>6a</b>     | (i) Real<br>314,545.          |  |                                      |   |
|  | <b>b</b>   | Less: rental expenses   | <b>6b</b>     | 102,208.                      |  |                                      |   |
|  | <b>c</b>   | Rental income or (loss)   | <b>6c</b>     | 212,337.                      |  |                                      |   |
|  | <b>d</b>   | Net rental income or (loss) . . . . .   |               | 212,337.                      | 5,160.                                       | 0.                                   | 207,177.  |
|  | <b>7a</b>  | Gross amount from<br>sales of assets<br>other than inventory  | <b>7a</b>     | (i) Securities<br>12,609,788. |  |                                      |   |
|  | <b>b</b>   | Less: cost or other basis<br>and sales expenses . . . . .   | <b>7b</b>     | 11,215,419.                   |  |                                      |   |
|  | <b>c</b>   | Gain or (loss) . . . . .  | <b>7c</b>     | 1,394,369.                    |  |                                      |   |
|  | <b>d</b>   | Net gain or (loss) . . . . .  |               | 1,394,369.                    | 0.   | 0.                                   | 1,394,369.  |
|  | <b>8a</b>  | Gross income from fundraising<br>events (not including \$ 92,780.<br>of contributions reported on line<br>1c). See Part IV, line 18 . . . . . | <b>8a</b>     | 126,256.                      |  |                                      |   |
|  | <b>b</b>   | Less: direct expenses . . . . .   | <b>8b</b>     | 134,964.                      |  |                                      |   |
|  | <b>c</b>   | Net income or (loss) from fundraising events . . . . .  |               | -8,708.                       |  |                                      |   |
|  | <b>9a</b>  | Gross income from gaming<br>activities. See Part IV, line 19 . . . . .  | <b>9a</b>     |                               |  |                                      |   |
|  | <b>b</b>   | Less: direct expenses . . . . .   | <b>9b</b>     |                               |  |                                      |   |
|  | <b>c</b>   | Net income or (loss) from gaming activities . . . . .   |               |                               |  |                                      |   |
|  | <b>10a</b>                                       | Gross sales of inventory, less<br>returns and allowances . . . . .  | <b>10a</b>    | 775,068.                      |  |                                      |   |
|  | <b>b</b>   | Less: cost of goods sold . . . . .  | <b>10b</b>    | 345,029.                      |  |                                      |   |
|  | <b>c</b>   | Net income or (loss) from sales of inventory . . . . .  |               | 430,039.                      |  |                                      |   |
| <b>Miscellaneous<br/>Revenue</b>                                   |  |   | Business Code |                               |  |                                      |   |
|  | <b>11a</b>                                       | OTHER INCOME  | 900099        | 167,781.                      | 58,994.                                      | 0.                                   | 108,787.  |
|  | <b>b</b>   |   |               |                               |  |                                      |   |
|  | <b>c</b>   |   |               |                               |  |                                      |   |
|  | <b>d</b>   | All other revenue . . . . .   |               |                               |  |                                      |   |
| <b>e</b>   | <b>Total.</b> Add lines 11a-11d . . . . .        |   | 167,781.      |                               |  |                                      |   |
| <b>12</b>  | <b>Total revenue.</b> See instructions . . . . . |   |               | 29,167,793.                   | 6,155,628.                                   | 0.                                   | 3,336,830.  |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

|   | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|---|-----------------------|---------------------------------|--|-----------------------------|
| <b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .   | 37,000.               | 37,000.                         |  |                             |
| <b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .  |                       |                                 |  |                             |
| <b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .   |                       |                                 |  |                             |
| <b>4</b> Benefits paid to or for members . . . . .  |                       |                                 |  |                             |
| <b>5</b> Compensation of current officers, directors, trustees, and key employees . . . . .   | 328,921.              | 115,062.                        | 128,789.                               | 85,070.                     |
| <b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .   |                       |                                 |  |                             |
| <b>7</b> Other salaries and wages . . . . .   | 6,256,184.            | 5,366,540.                      | 485,442.                               | 404,202.                    |
| <b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .   | 183,191.              | 148,924.                        | 21,196.                                | 13,071.                     |
| <b>9</b> Other employee benefits . . . . .  | 1,486,451.            | 1,282,129.                      | 109,621.                               | 94,701.                     |
| <b>10</b> Payroll taxes . . . . .   | 541,650.              | 440,386.                        | 66,425.                                | 34,839.                     |
| <b>11</b> Fees for services (nonemployees):   |                       |                                 |  |                             |
| <b>a</b> Management . . . . .   |                       |                                 |  |                             |
| <b>b</b> Legal . . . . .  | 9,778.                | 0.                              | 9,778.                                 | 0.                          |
| <b>c</b> Accounting . . . . .   | 156,217.              | 0.                              | 156,217.                               | 0.                          |
| <b>d</b> Lobbying . . . . .   |                       |                                 |  |                             |
| <b>e</b> Professional fundraising services. See Part IV, line 17 . . . . .  |                       |                                 |  |                             |
| <b>f</b> Investment management fees . . . . .   | 234,579.              | 0.                              | 234,579.                               | 0.                          |
| <b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.) . . . . .  | 624,899.              | 621,256.                        | 3,643.                                 | 0.                          |
| <b>12</b> Advertising and promotion . . . . .   | 242,209.              | 241,837.                        | 0.                                     | 372.                        |
| <b>13</b> Office expenses . . . . .   | 360,242.              | 254,972.                        | 65,348.                                | 39,922.                     |
| <b>14</b> Information technology . . . . .  | 155,215.              | 49,842.                         | 73,703.                                | 31,670.                     |
| <b>15</b> Royalties . . . . .   |                       |                                 |  |                             |
| <b>16</b> Occupancy . . . . .   | 582,842.              | 553,526.                        | 26,044.                                | 3,272.                      |
| <b>17</b> Travel . . . . .  | 342,642.              | 229,238.                        | 105,890.                               | 7,514.                      |
| <b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .  |                       |                                 |  |                             |
| <b>19</b> Conferences, conventions, and meetings . . . . .  | 142,669.              | 112,392.                        | 18,466.                                | 11,811.                     |
| <b>20</b> Interest . . . . .  | 5,989.                | 858.                            | 5,131.                                 | 0.                          |
| <b>21</b> Payments to affiliates . . . . .  |                       |                                 |  |                             |
| <b>22</b> Depreciation, depletion, and amortization . . . . .   | 1,310,037.            | 1,308,059.                      | 1,978.                                 | 0.                          |
| <b>23</b> Insurance . . . . .   | 442,429.              | 271,356.                        | 157,418.                               | 13,655.                     |
| <b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.) . . . . .   |                       |                                 |  |                             |
| <b>a</b> <u>HORTICULTURE &amp; GROUNDS SUPPLIES</u> . . . . .   | 220,112.              | 220,112.                        | 0.                                     | 0.                          |
| <b>b</b> <u>REPAIRS &amp; MAINTENANCE</u> . . . . .   | 221,496.              | 202,841.                        | 18,634.                                | 21.                         |
| <b>c</b> <u>TOUR FOOD, SUPPLIES, INTERPRETATION, BUS GAS</u> . . . . .  | 459,732.              | 459,732.                        | 0.                                     | 0.                          |
| <b>d</b> <u>PROGRAMS &amp; EVENTS</u> . . . . .   | 60,344.               | 53,689.                         | 823.                                   | 5,832.                      |
| <b>e</b> All other expenses . . . . .   | 12,715.               | 11,540.                         | 0.                                     | 1,175.                      |
| <b>25</b> <b>Total functional expenses.</b> Add lines 1 through 24e . . . . .   | 14,417,543.           | 11,981,291.                     | 1,689,125.                             | 747,127.                    |
| <b>26</b> <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . . |                       |                                 |  |                             |

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

|  |  | (A)<br>Beginning of year |             | (B)<br>End of year |
|--|--|--------------------------|-------------|--------------------|
| <b>Assets</b>  | <b>1</b> Cash—non-interest-bearing . . . . .   | 766,725.                 | <b>1</b>    | 600,070.           |
|  | <b>2</b> Savings and temporary cash investments . . . . .  | 4,140,939.               | <b>2</b>    | 5,361,315.         |
|  | <b>3</b> Pledges and grants receivable, net . . . . .  | 1,329,734.               | <b>3</b>    | 1,505,313.         |
|  | <b>4</b> Accounts receivable, net . . . . .  | 151,011.                 | <b>4</b>    | 244,700.           |
|  | <b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . . |                          | <b>5</b>    |                    |
|  | <b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) . . . . .   |                          | <b>6</b>    |                    |
|  | <b>7</b> Notes and loans receivable, net . . . . .   |                          | <b>7</b>    |                    |
|  | <b>8</b> Inventories for sale or use . . . . .   | 217,018.                 | <b>8</b>    | 170,658.           |
|  | <b>9</b> Prepaid expenses and deferred charges . . . . .   | 389,627.                 | <b>9</b>    | 440,702.           |
|  | <b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D . . . . .   | <b>10a</b> 62,999,916.   |             |                    |
|  | <b>b</b> Less: accumulated depreciation . . . . .  | <b>10b</b> 27,650,684.   |             |                    |
|  | <b>11</b> Investments—publicly traded securities . . . . .   | 34,773,829.              | <b>10c</b>  | 35,349,232.        |
|  | <b>12</b> Investments—other securities. See Part IV, line 11 . . . . .   | 26,939,369.              | <b>11</b>   | 41,715,066.        |
|  | <b>13</b> Investments—program-related. See Part IV, line 11 . . . . .  |                          | <b>12</b>   |                    |
|  | <b>14</b> Intangible assets . . . . .  | 1,335,000.               | <b>13</b>   | 1,335,000.         |
|  | <b>15</b> Other assets. See Part IV, line 11 . . . . .   | 980,000.                 | <b>14</b>   | 980,000.           |
| <b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) . . . . .   | 10,917,990.  | <b>15</b>                | 11,128,765. |                    |
| <b>17</b> Accounts payable and accrued expenses . . . . .  | 81,941,242.  | <b>16</b>                | 98,830,821. |                    |
| <b>18</b> Grants payable . . . . .   | 1,169,605.   | <b>17</b>                | 1,088,857.  |                    |
| <b>19</b> Deferred revenue . . . . .   |  | <b>18</b>                |             |                    |
| <b>20</b> Tax-exempt bond liabilities . . . . .  |  | <b>19</b>                |             |                    |
| <b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .  |  | <b>20</b>                |             |                    |
| <b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . . |  | <b>21</b>                |             |                    |
| <b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .   |  | <b>22</b>                |             |                    |
| <b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .   | 270,227.   | <b>23</b>                | 388,017.    |                    |
| <b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17–24). Complete Part X of Schedule D . . . . .                                      |  | <b>24</b>                |             |                    |
| <b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 . . . . .  | 324,287.   | <b>25</b>                | 301,594.    |                    |
| <b>27</b> Net assets without donor restrictions . . . . .  | 1,764,119.   | <b>26</b>                | 1,778,468.  |                    |
| <b>28</b> Net assets with donor restrictions . . . . .   |  |                          |             |                    |
| <b>29</b> Capital stock or trust principal, or current funds . . . . .   |  |                          |             |                    |
| <b>30</b> Paid-in or capital surplus, or land, building, or equipment fund . . . . .   |  |                          |             |                    |
| <b>31</b> Retained earnings, endowment, accumulated income, or other funds . . . . .   |  |                          |             |                    |
| <b>32</b> Total net assets or fund balances . . . . .  |  |                          |             |                    |
| <b>33</b> Total liabilities and net assets/fund balances . . . . .   |  |                          |             |                    |

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☒

|           |  |           |             |
|-----------|--|-----------|-------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12)  | <b>1</b>  | 29,167,793. |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25)   | <b>2</b>  | 14,417,543. |
| <b>3</b>  | Revenue less expenses. Subtract line 2 from line 1   | <b>3</b>  | 14,750,250. |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                      | <b>4</b>  | 80,177,123. |
| <b>5</b>  | Net unrealized gains (losses) on investments   | <b>5</b>  | 2,124,980.  |
| <b>6</b>  | Donated services and use of facilities   | <b>6</b>  |             |
| <b>7</b>  | Investment expenses  | <b>7</b>  |             |
| <b>8</b>  | Prior period adjustments   | <b>8</b>  |             |
| <b>9</b>  | Other changes in net assets or fund balances (explain on Schedule O)   | <b>9</b>  |             |
| <b>10</b> | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | <b>10</b> | 97,052,353. |

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

|   | Yes | No |
|---|-----|----|
| <b>1</b> Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.  |     |    |
| <b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? . . .<br>If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both.<br><input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis |     | X  |
| <b>b</b> Were the organization's financial statements audited by an independent accountant? . . .<br>If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both.<br><input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis                 | X   |    |
| <b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . .<br>If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.  | X   |    |
| <b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? . . .   |     | X  |
| <b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits .   |     |    |

**Form 990: Return of Organization Exempt from Income Tax****Part VII: Section A (continued)****Continuation Statement**

| Name and title                      | Average hours per week (list any hours for related organizations on the right) |  | Position                            |                            |              |                   |                                   |             | Reportable compensation from the organization (W-2/1099-MISC) | Reportable compensation from related organizations (W-2/1099-MISC) | Estimated amount of other compensation from the organization and related organizations |
|-------------------------------------|--|--|-------------------------------------|----------------------------|--------------|-------------------|-----------------------------------|-------------|---|--|--|
|                                     |  |  | C1 - Individual trustee or director | C2 - Institutional trustee | C3 - Officer | C4 - Key employee | C5 - Highest compensated employee | C6 - Former |   |  |  |
|                                     |  |  | C1                                  | C2                         | C3           | C4                | C5                                | C6          |   |  |  |
| JANET L. MAYFIELD<br>CEO & DIRECTOR | 60.00  |  | X                                   |                            | X            |                   |                                   |             | 173,319.  | 0.   | 19,527.  |
| TAMARA A. ROLLINS<br>CFO            | 60.00  |  |                                     |                            | X            |                   |                                   |             | 130,590.  | 0.   | 5,484.   |
|                                     |  |  |                                     |                            |              |                   |                                   |             | 303,909.  | 0.   | 25,011.  |

**Additional Information From Form 990: Return of Organization Exempt from Income Tax****Form 990: Return of Organization Exempt from Income Tax****Form 990, Page 2, Part III, Line 4c (continued)****Continuation Statement**

| Description  |
|--|
| THE KAMPONG, IN COCONUT GROVE, FL IS HOME TO THE FORMER RESIDENCE OF DR. DAVID FAIRCHILD, AN AMERICAN BOTANIST WHO WAS RESPONSIBLE |
| FOR THE INTRODUCTION OF MORE THAN 200,000 EXOTIC PLANTS & CROPS IN THE U.S.  |

**Form 990: Return of Organization Exempt from Income Tax****Part VI, Line 17 (continued)****Continuation Statement**

| States Where Copy of Return is Required |
|---|
| HI                                      |
| FL                                      |

SCHEDULE A  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public  
Inspection

Name of the organization

NATIONAL TROPICAL BOTANICAL GARDEN

Employer identification number

52-6057064

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives (1) more than 33<sup>1</sup>/<sub>3</sub>% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33<sup>1</sup>/<sub>3</sub>% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations . . . . .
- g Provide the following information about the supported organization(s).

| (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1–10 above (see instructions)) | (iv) Is the organization listed in your governing document? |    | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|------------------------------------|----------|---|---|----|---|---|
|                                    |          |   | Yes   | No |   |   |
| (A)                                |          |   |   |    |   |   |
| (B)                                |          |   |   |    |   |   |
| (C)                                |          |   |   |    |   |   |
| (D)                                |          |   |   |    |   |   |
| (E)                                |          |   |   |    |   |   |
| Total                              |          |   |   |    |   |   |

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)  | (a) 2020   | (b) 2021   | (c) 2022   | (d) 2023   | (e) 2024    | (f) Total   |
|--|------------|------------|------------|------------|-------------|-------------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . .  | 5,941,401. | 6,624,988. | 5,394,513. | 5,073,047. | 19,675,335. | 42,709,284. |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . .   |            |            |            |            |             |             |
| <b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . .   |            |            |            |            |             |             |
| <b>4 Total.</b> Add lines 1 through 3 . . .  | 5,941,401. | 6,624,988. | 5,394,513. | 5,073,047. | 19,675,335. | 42,709,284. |
| <b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . |            |            |            |            |             | 13,503,847. |
| <b>6 Public support.</b> Subtract line 5 from line 4   |            |            |            |            |             | 29,205,437. |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)  | (a) 2020   | (b) 2021   | (c) 2022   | (d) 2023   | (e) 2024              | (f) Total   |
|--|------------|------------|------------|------------|-----------------------|-------------|
| <b>7</b> Amounts from line 4 . . .   | 5,941,401. | 6,624,988. | 5,394,513. | 5,073,047. | 19,675,335.           | 42,709,284. |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . .   | 773,016.   | 837,421.   | 1,247,464. | 1,299,018. | 1,519,711.            | 5,676,630.  |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . .  | 0.         | 0.         | 1,624.     | 0.         | 0.                    | 1,624.      |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . .  | 30,832.    | 1,130,931. | 441,745.   | 156,112.   | 167,783.              | 1,927,403.  |
| <b>11 Total support.</b> Add lines 7 through 10  |            |            |            |            |                       | 50,314,941. |
| <b>12</b> Gross receipts from related activities, etc. (see instructions) . . .  |            |            |            |            | <b>12</b> 26,515,036. |             |
| <b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . <input type="checkbox"/> |            |            |            |            |                       |             |

**Section C. Computation of Public Support Percentage**

|  |           |         |
|--|-----------|---------|
| <b>14</b> Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f)) . . .  | <b>14</b> | 58.05 % |
| <b>15</b> Public support percentage from 2023 Schedule A, Part II, line 14 . . .   | <b>15</b> | 66.95 % |
| <b>16a 33<sup>1</sup>/<sub>3</sub>% support test—2024.</b> If the organization did not check the box on line 13, and line 14 is 33 <sup>1</sup> / <sub>3</sub> % or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . <input checked="" type="checkbox"/>  |           |         |
| <b>b 33<sup>1</sup>/<sub>3</sub>% support test—2023.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 <sup>1</sup> / <sub>3</sub> % or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . <input type="checkbox"/>  |           |         |
| <b>17a 10%-facts-and-circumstances test—2024.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization . . . <input type="checkbox"/>    |           |         |
| <b>b 10%-facts-and-circumstances test—2023.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization . . . <input type="checkbox"/> |           |         |
| <b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . <input type="checkbox"/>  |           |         |



**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II.  
If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)   | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|---|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")   |          |          |          |          |          |           |
| <b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . |          |          |          |          |          |           |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513   |          |          |          |          |          |           |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . .  |          |          |          |          |          |           |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . .  |          |          |          |          |          |           |
| <b>6 Total.</b> Add lines 1 through 5 . . . .   |          |          |          |          |          |           |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . .  |          |          |          |          |          |           |
| <b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year                   |          |          |          |          |          |           |
| <b>c</b> Add lines 7a and 7b . . . .  |          |          |          |          |          |           |
| <b>8 Public support.</b> (Subtract line 7c from line 6.) . . . .  |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)  | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|--|----------|----------|----------|----------|----------|-----------|
| <b>9</b> Amounts from line 6 . . . .   |          |          |          |          |          |           |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources   |          |          |          |          |          |           |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . .   |          |          |          |          |          |           |
| <b>c</b> Add lines 10a and 10b . . . .   |          |          |          |          |          |           |
| <b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  |          |          |          |          |          |           |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . .  |          |          |          |          |          |           |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) . . . .   |          |          |          |          |          |           |
| <b>14 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . <input type="checkbox"/> |          |          |          |          |          |           |

**Section C. Computation of Public Support Percentage**

|   |           |   |
|---|-----------|---|
| <b>15</b> Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f)) . . . . | <b>15</b> | % |
| <b>16</b> Public support percentage from 2023 Schedule A, Part III, line 15 . . . .                       | <b>16</b> | % |

**Section D. Computation of Investment Income Percentage**

|  |           |   |
|--|-----------|---|
| <b>17</b> Investment income percentage for <b>2024</b> (line 10c, column (f), divided by line 13, column (f)) . . .  | <b>17</b> | % |
| <b>18</b> Investment income percentage from <b>2023</b> Schedule A, Part III, line 17 . . . .  | <b>18</b> | % |
| <b>19a 33<sup>1</sup>/<sub>3</sub>% support tests—2024.</b> If the organization did not check the box on line 14, and line 15 is more than 33 <sup>1</sup> / <sub>3</sub> %, and line 17 is not more than 33 <sup>1</sup> / <sub>3</sub> %, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . <input type="checkbox"/>         |           |   |
| <b>b 33<sup>1</sup>/<sub>3</sub>% support tests—2023.</b> If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 <sup>1</sup> / <sub>3</sub> %, and line 18 is not more than 33 <sup>1</sup> / <sub>3</sub> %, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . <input type="checkbox"/> |           |   |
| <b>20 Private foundation.</b> If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . . . <input type="checkbox"/>  |           |   |

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>  |     |    |
| <b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>   |     |    |
| <b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>  |     |    |
| <b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.</i>   |     |    |
| <b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.</i>  |     |    |
| <b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>   |     |    |
| <b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>  |     |    |
| <b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>   |     |    |
| <b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in <b>Part VI</b>, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i> |     |    |
| <b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?  |     |    |
| <b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?   |     |    |
| <b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in <b>Part VI</b>.</i>  |     |    |
| <b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>   |     |    |
| <b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>   |     |    |
| <b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in <b>Part VI</b>.</i>   |     |    |
| <b>b</b> Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in <b>Part VI</b>.</i>  |     |    |
| <b>c</b> Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in <b>Part VI</b>.</i>   |     |    |
| <b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>   |     |    |
| <b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>  |     |    |

**Part IV Supporting Organizations** (continued)

|  | Yes | No |
|--|-----|----|
| <b>11</b> Has the organization accepted a gift or contribution from any of the following persons?  |     |    |
| <b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization? |     |    |
| <b>11a</b>   |     |    |
| <b>b</b> A family member of a person described on line 11a above?  |     |    |
| <b>11b</b>   |     |    |
| <b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in <b>Part VI</b> .                             |     |    |
| <b>11c</b>   |     |    |

**Section B. Type I Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year. |     |    |
| <b>1</b>  |     |    |
| <b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.   |     |    |
| <b>2</b>  |     |    |

**Section C. Type II Supporting Organizations**

|  | Yes | No |
|--|-----|----|
| <b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s). |     |    |
| <b>1</b>   |     |    |

**Section D. All Type III Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? |     |    |
| <b>1</b>  |     |    |
| <b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s), or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).  |     |    |
| <b>2</b>  |     |    |
| <b>3</b> By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.  |     |    |
| <b>3</b>  |     |    |

**Section E. Type III Functionally Integrated Supporting Organizations**

|   |  |  |  |
|---|--|--|--|
| <b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).  |  |  |  |
| <b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.   |  |  |  |
| <b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.  |  |  |  |
| <b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a governmental entity (see instructions).  |  |  |  |
| <b>2</b> Activities Test. Answer lines 2a and 2b below.   |  |  |  |
| <b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities. |  |  |  |
| <b>2a</b>   |  |  |  |
| <b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.  |  |  |  |
| <b>2b</b>   |  |  |  |
| <b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.   |  |  |  |
| <b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in <b>Part VI</b> .   |  |  |  |
| <b>3a</b>   |  |  |  |
| <b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.   |  |  |  |
| <b>3b</b>   |  |  |  |

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1** ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

| <b>Section A—Adjusted Net Income</b>  |  | (A) Prior Year | (B) Current Year (optional) |
|---------------------------------------|--|----------------|-----------------------------|
| <b>1</b>                              | Net short-term capital gain  | <b>1</b>       |                             |
| <b>2</b>                              | Recoveries of prior-year distributions   | <b>2</b>       |                             |
| <b>3</b>                              | Other gross income (see instructions)  | <b>3</b>       |                             |
| <b>4</b>                              | Add lines 1 through 3.   | <b>4</b>       |                             |
| <b>5</b>                              | Depreciation and depletion   | <b>5</b>       |                             |
| <b>6</b>                              | Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | <b>6</b>       |                             |
| <b>7</b>                              | Other expenses (see instructions)  | <b>7</b>       |                             |
| <b>8</b>                              | <b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)  | <b>8</b>       |                             |
| <b>Section B—Minimum Asset Amount</b> |  | (A) Prior Year | (B) Current Year (optional) |
| <b>1</b>                              | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):  |                |                             |
| <b>a</b>                              | Average monthly value of securities  | <b>1a</b>      |                             |
| <b>b</b>                              | Average monthly cash balances  | <b>1b</b>      |                             |
| <b>c</b>                              | Fair market value of other non-exempt-use assets   | <b>1c</b>      |                             |
| <b>d</b>                              | <b>Total</b> (add lines 1a, 1b, and 1c)  | <b>1d</b>      |                             |
| <b>e</b>                              | <b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):   |                |                             |
| <b>2</b>                              | Acquisition indebtedness applicable to non-exempt-use assets   | <b>2</b>       |                             |
| <b>3</b>                              | Subtract line 2 from line 1d.  | <b>3</b>       |                             |
| <b>4</b>                              | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).   | <b>4</b>       |                             |
| <b>5</b>                              | Net value of non-exempt-use assets (subtract line 4 from line 3)   | <b>5</b>       |                             |
| <b>6</b>                              | Multiply line 5 by 0.035.  | <b>6</b>       |                             |
| <b>7</b>                              | Recoveries of prior-year distributions   | <b>7</b>       |                             |
| <b>8</b>                              | <b>Minimum Asset Amount</b> (add line 7 to line 6)   | <b>8</b>       |                             |
| <b>Section C—Distributable Amount</b> |  |                | Current Year                |
| <b>1</b>                              | Adjusted net income for prior year (from Section A, line 8, column A)  | <b>1</b>       |                             |
| <b>2</b>                              | Enter 0.85 of line 1.  | <b>2</b>       |                             |
| <b>3</b>                              | Minimum asset amount for prior year (from Section B, line 8, column A)   | <b>3</b>       |                             |
| <b>4</b>                              | Enter greater of line 2 or line 3.   | <b>4</b>       |                             |
| <b>5</b>                              | Income tax imposed in prior year   | <b>5</b>       |                             |
| <b>6</b>                              | <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).  | <b>6</b>       |                             |
| <b>7</b>                              | <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).                                |                |                             |

**Part V** Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations *(continued)*

| <b>Section D—Distributions</b> |   | <b>Current Year</b> |
|--------------------------------|---|---------------------|
| <b>1</b>                       | Amounts paid to supported organizations to accomplish exempt purposes   | <b>1</b>            |
| <b>2</b>                       | Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity               | <b>2</b>            |
| <b>3</b>                       | Administrative expenses paid to accomplish exempt purposes of supported organizations   | <b>3</b>            |
| <b>4</b>                       | Amounts paid to acquire exempt-use assets   | <b>4</b>            |
| <b>5</b>                       | Qualified set-aside amounts (prior IRS approval required— <i>provide details in Part VI</i> )   | <b>5</b>            |
| <b>6</b>                       | Other distributions ( <i>describe in Part VI</i> ). See instructions.   | <b>6</b>            |
| <b>7</b>                       | <b>Total annual distributions.</b> Add lines 1 through 6.   | <b>7</b>            |
| <b>8</b>                       | Distributions to attentive supported organizations to which the organization is responsive ( <i>provide details in Part VI</i> ). See instructions. | <b>8</b>            |
| <b>9</b>                       | Distributable amount for 2024 from Section C, line 6  | <b>9</b>            |
| <b>10</b>                      | Line 8 amount divided by line 9 amount  | <b>10</b>           |

| <b>Section E—Distribution Allocations</b> (see instructions)   | <b>(i)<br/>Excess Distributions</b> | <b>(ii)<br/>Underdistributions<br/>Pre-2024</b> | <b>(iii)<br/>Distributable<br/>Amount for 2024</b> |
|--|-------------------------------------|---|--|
| <b>1</b> Distributable amount for 2024 from Section C, line 6  |                                     |   |  |
| <b>2</b> Underdistributions, if any, for years prior to 2024 (reasonable cause required— <i>explain in Part VI</i> ). See instructions.  |                                     |   |  |
| <b>3</b> Excess distributions carryover, if any, to 2024   |                                     |   |  |
| <b>a</b> From 2019 . . . . .   |                                     |   |  |
| <b>b</b> From 2020 . . . . .   |                                     |   |  |
| <b>c</b> From 2021 . . . . .   |                                     |   |  |
| <b>d</b> From 2022 . . . . .   |                                     |   |  |
| <b>e</b> From 2023 . . . . .   |                                     |   |  |
| <b>f</b> <b>Total</b> of lines 3a through 3e   |                                     |   |  |
| <b>g</b> Applied to underdistributions of prior years  |                                     |   |  |
| <b>h</b> Applied to 2024 distributable amount  |                                     |   |  |
| <b>i</b> Carryover from 2019 not applied (see instructions)  |                                     |   |  |
| <b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.  |                                     |   |  |
| <b>4</b> Distributions for 2024 from Section D, line 7: \$   |                                     |   |  |
| <b>a</b> Applied to underdistributions of prior years  |                                     |   |  |
| <b>b</b> Applied to 2024 distributable amount  |                                     |   |  |
| <b>c</b> Remainder. Subtract lines 4a and 4b from line 4.  |                                     |   |  |
| <b>5</b> Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions. |                                     |   |  |
| <b>6</b> Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.                        |                                     |   |  |
| <b>7</b> <b>Excess distributions carryover to 2025.</b> Add lines 3j and 4c.   |                                     |   |  |
| <b>8</b> Breakdown of line 7:  |                                     |   |  |
| <b>a</b> Excess from 2020 . . .  |                                     |   |  |
| <b>b</b> Excess from 2021 . . .  |                                     |   |  |
| <b>c</b> Excess from 2022 . . .  |                                     |   |  |
| <b>d</b> Excess from 2023 . . .  |                                     |   |  |
| <b>e</b> Excess from 2024 . . .  |                                     |   |  |

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Pt II Ln 10: Other Income Part II, Line 10 Description: MISCELLANEOUS 2020:  
21077. 2021: 48134. 2022: 183735. 2023: 29881. 2024: 61018. Description: SPECIAL  
EVENTS/BOARD MTGS 2020: 22258. 2021: 0. 2022: 258010. 2023: 126231. 2024: 106765.  
Description: LIMITED PARTNERSHIP INC FROM K-1S 2020: -12503. 2021: -3195. 2022:  
0. 2023: 0. Description: EMPLOYEE RETENTION CREDIT 2021: 1085992. 2022: 0. 2023:  
0.



SCHEDULE D
(Form 990)

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public
Inspection

Name of the organization: NATIONAL TROPICAL BOTANICAL GARDEN
Employer identification number: 52-6057064

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts
Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: Line number, (a) Donor advised funds, (b) Funds and other accounts. Includes questions 1-6 regarding donor advised funds.

Part II Conservation Easements
Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Table with 3 columns: Line number, Description, Held at the End of the Tax Year. Includes questions 1-9 regarding conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets
Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Table with 3 columns: Line number, Description, Amount. Includes questions 1a, 1b, 2 regarding collections of art and historical treasures.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

**3** Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

**a** ☐ Public exhibition

**d** ☐ Loan or exchange program

**b** ☒ Scholarly research

**e** ☐ Other \_\_\_\_\_

**c** ☒ Preservation for future generations

**4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

**5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☒ **Yes** ☐ **No**

**Part IV Escrow and Custodial Arrangements**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

**1a** Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ **Yes** ☐ **No**

**b** If "Yes," explain the arrangement in Part XIII and complete the following table.

|  | Amount    |
|--|-----------|
| <b>c</b> Beginning balance             | <b>1c</b> |
| <b>d</b> Additions during the year     | <b>1d</b> |
| <b>e</b> Distributions during the year | <b>1e</b> |
| <b>f</b> Ending balance                | <b>1f</b> |

**2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ **Yes** ☐ **No**

**b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

**Part V Endowment Funds**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

|   | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|---|------------------|----------------|--------------------|----------------------|---------------------|
| <b>1a</b> Beginning of year balance                     | 24,215,064.      | 22,289,655.    | 24,959,079.        | 20,919,171.          | 19,347,716.         |
| <b>b</b> Contributions                                  | 12,000,000.      | 0.             | 1,330,000.         | 0.                   | 40,476.             |
| <b>c</b> Net investment earnings, gains, and losses     | 3,790,423.       | 3,147,024.     | -2,858,166.        | 5,014,164.           | 2,432,938.          |
| <b>d</b> Grants or scholarships                         |                  |                |                    |                      |                     |
| <b>e</b> Other expenditures for facilities and programs | 1,126,810.       | 1,010,386.     | 937,997.           | 805,412.             | 748,312.            |
| <b>f</b> Administrative expenses                        | 211,658.         | 211,229.       | 203,261.           | 168,844.             | 153,647.            |
| <b>g</b> End of year balance                            | 38,667,019.      | 24,215,064.    | 22,289,655.        | 24,959,079.          | 20,919,171.         |

**2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

**a** Board designated or quasi-endowment 7.%

**b** Permanent endowment 93.%

**c** Term endowment 0.%

The percentages on lines 2a, 2b, and 2c should equal 100%.

**3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

**(i)** Unrelated organizations? ☒ **Yes** ☐ **No**

**(ii)** Related organizations? ☒ **Yes** ☐ **No**

**b** If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐ **Yes** ☐ **No**

**4** Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property   | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|---|--------------------------------------|---------------------------------|------------------------------|----------------|
| <b>1a</b> Land  | 800,000.                             | 18,177,500.                     |                              | 18,977,500.    |
| <b>b</b> Buildings  |                                      | 23,344,346.                     | 13,020,514.                  | 10,323,832.    |
| <b>c</b> Leasehold improvements   |                                      | 10,180,035.                     | 6,811,690.                   | 3,368,345.     |
| <b>d</b> Equipment  |                                      | 9,230,404.                      | 7,482,156.                   | 1,748,248.     |
| <b>e</b> Other  |                                      | 1,267,631.                      | 336,324.                     | 931,307.       |
| <b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B)) |                                      |                                 |                              | 35,349,232.    |



**Part VII Investments—Other Securities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

| (a) Description of security or category<br>(including name of security)         | (b) Book value | (c) Method of valuation:<br>Cost or end-of-year market value |
|---|----------------|--|
| (1) Financial derivatives . . . . .   |                |  |
| (2) Closely held equity interests . . . . .                                     |                |  |
| (3) Other _____   |                |  |
| (A) _____   |                |  |
| (B) _____   |                |  |
| (C) _____   |                |  |
| (D) _____   |                |  |
| (E) _____   |                |  |
| (F) _____   |                |  |
| (G) _____   |                |  |
| (H) _____   |                |  |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, line 12, col. (B)) . . . |                |  |

**Part VIII Investments—Program Related**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

| (a) Description of investment   | (b) Book value | (c) Method of valuation:<br>Cost or end-of-year market value |
|---|----------------|--|
| (1)   |                |  |
| (2)   |                |  |
| (3)   |                |  |
| (4)   |                |  |
| (5)   |                |  |
| (6)   |                |  |
| (7)   |                |  |
| (8)   |                |  |
| (9)   |                |  |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, line 13, col. (B)) . . . |                |  |

**Part IX Other Assets**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

| (a) Description   | (b) Book value |
|---|----------------|
| (1) BOTANICAL ART COLLECTION  | 465,220.       |
| (2) MARKS BOTANICAL LIBRARY   | 8,000,000.     |
| (3) BENEFICIAL INTEREST IN PERPETUITY   | 2,663,545.     |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, line 15, col. (B)) . . . . . | 11,128,765.    |

**Part X Other Liabilities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

| 1. (a) Description of liability   | (b) Book value |
|---|----------------|
| (1) Federal income taxes  |                |
| (2) CHARITABLE GIFT ANNUITY   | 301,594.       |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, line 25, col. (B)) . . . . . | 301,594.       |

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ☒

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|          |   |           |             |
|----------|---|-----------|-------------|
| <b>1</b> | Total revenue, gains, and other support per audited financial statements . . . . .        | <b>1</b>  | 31,309,433. |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part VIII, line 12:                       |           |             |
| <b>a</b> | Net unrealized gains (losses) on investments . . . . .                                    | <b>2a</b> | 2,124,980.  |
| <b>b</b> | Donated services and use of facilities . . . . .  | <b>2b</b> | 15,872.     |
| <b>c</b> | Recoveries of prior year grants . . . . .   | <b>2c</b> |             |
| <b>d</b> | Other (Describe in Part XIII.) . . . . .  | <b>2d</b> | 242,172.    |
| <b>e</b> | Add lines 2a through 2d . . . . .   | <b>2e</b> | 2,383,024.  |
| <b>3</b> | Subtract line 2e from line 1 . . . . .  | <b>3</b>  | 28,926,409. |
| <b>4</b> | Amounts included on Form 990, Part VIII, line 12, but not on line 1:                      |           |             |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                | <b>4a</b> | 234,579.    |
| <b>b</b> | Other (Describe in Part XIII.) . . . . .  | <b>4b</b> | 6,805.      |
| <b>c</b> | Add lines 4a and 4b . . . . .   | <b>4c</b> | 241,384.    |
| <b>5</b> | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) . . . . . | <b>5</b>  | 29,167,793. |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|          |  |           |             |
|----------|--|-----------|-------------|
| <b>1</b> | Total expenses and losses per audited financial statements . . . . .                       | <b>1</b>  | 14,434,203. |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part IX, line 25:                          |           |             |
| <b>a</b> | Donated services and use of facilities . . . . .   | <b>2a</b> | 15,872.     |
| <b>b</b> | Prior year adjustments . . . . .   | <b>2b</b> |             |
| <b>c</b> | Other losses . . . . .   | <b>2c</b> |             |
| <b>d</b> | Other (Describe in Part XIII.) . . . . .   | <b>2d</b> | 235,367.    |
| <b>e</b> | Add lines 2a through 2d . . . . .  | <b>2e</b> | 251,239.    |
| <b>3</b> | Subtract line 2e from line 1 . . . . .   | <b>3</b>  | 14,182,964. |
| <b>4</b> | Amounts included on Form 990, Part IX, line 25, but not on line 1:                         |           |             |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                 | <b>4a</b> | 234,579.    |
| <b>b</b> | Other (Describe in Part XIII.) . . . . .   | <b>4b</b> |             |
| <b>c</b> | Add lines 4a and 4b . . . . .  | <b>4c</b> | 234,579.    |
| <b>5</b> | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) . . . . . | <b>5</b>  | 14,417,543. |

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Pt XI, Line 2d: RENTAL EXPENSES NETTED AGAINST RENTAL INCOME \$102,208, FUNDRAISING

EXPENSES NETTED AGAINST FUNDRAISING INCOME \$134,964, PLEDGE WRITE OFF \$5,000

= \$242,172.

Pt XII, Line 2d: Rental expenses of \$102,208, FUNDRAISING EXPENSES OF \$128,159,

PLEDGE WRITE-OFF \$5,000 = \$235,367.

Pt II, Line 5: THE GARDEN RECEIVED THE CONTRIBUTION OF A CONSERVATION EASEMENT

IN DECEMBER 2008. IT IS THE FIRST GIFT OF THIS TYPE THAT THE GARDEN HAS RECEIVED

SINCE THE ORGANIZATION'S FORMATION. A FORMAL WRITTEN POLICY REGARDING ENFORCEMENT

OF THE EASEMENT WAS ADOPTED BY THE GARDEN. THE CONSERVATION EASEMENT DOCUMENTATION

INCLUDES UNDER SECTION 4.1 RESERVED RIGHTS (OF THE HOLDER) REGARDING MONITORING,

INSPECTION, VIOLATIONS, AND ENFORCEMENT OF THE EASEMENT.

**Part XIII** Supplemental Information *(continued)*

Pt II, Line 9: THE GARDEN'S AUDITED FINANCIAL STATEMENTS FOR 2024 REFLECT THE  
VALUE OF THE CONSERVATION EASEMENT CONTRIBUTED TO THE GARDEN.

Pt III, Line 4: FINANCIAL STATEMENTS FOOTNOTE THAT ART OBJECTS ARE CAPITALIZED  
AT COST, IF PURCHASED, OR AT FAIR VALUE, IF DETERMINABLE, AT THE DATE OF DONATION.  
THE BOTANICAL ART COLLECTION CONSISTS OF PAINTINGS, BOOKS, PRINTS, ETC. OF RARE  
AND ENDANGERED SPECIES. IT IS A WORLD CLASS COLLECTION OF RARE BOTANICAL VOLUMES,  
PRINTS, ETC. SOME DATING BACK TO THE 1500'S. NTBG HAS EXPENDED CONSIDERABLE EFFORT  
AND FUNDS TO PROVIDE PROPER FACILITIES (TEMPERATURE AND HUMIDITY CONTROLLED)  
TO PROTECT THIS RARE AND EXTENSIVE COLLECTION FOR USE PRESENTLY AND IN THE FUTURE  
BY BOTANICAL AND OTHER SCHOLARS.

Pt V, Line 4: ENDOWMENT FUNDS ARE USED TO SUPPORT PROGRAM SERVICES AND GENERAL  
OPERATIONS OF THE GARDEN.

Pt X, Line 2: THE GARDEN DETERMINES WHETHER A TAX POSITION IS MORE LIKELY THAN  
NOT TO BE SUSTAINED UPON EXAMINATION, INCLUDING RESOLUTION OF ANY RELATED APPEALS  
OR LITIGATION PROCESSES, BASED ON THE TECHNICAL MERITS OF THE POSITION. FOR  
TAX POSITIONS MEETING THE MORE-LIKELY-THAN-NOT THRESHOLD, THE TAX AMOUNT RECOGNIZED  
IN THE FINANCIAL STATEMENTS IS THE LARGEST BENEFIT THAT HAS A GREATER THAN 50%  
LIKELIHOOD OF BEING REALIZED UPON ULTIMATE SETTLEMENT WITH THE RELEVANT TAXING  
AUTHORITY.

Pt XI, Line 4b: GENERAL EXCISE TAX EXPENSE TO BE INCLUDED IN FUNDRAISING EXPENSES  
\$6,805.

Name of the organization: NATIONAL TROPICAL BOTANICAL GARDEN
Employer identification number: 52-6057064

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17.
Form 990-EZ filers are not required to complete this part.

- 1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
a Mail solicitations
b Internet and email solicitations
c Phone solicitations
d In-person solicitations
e Solicitation of nongovernment grants
f Solicitation of government grants
g Special fundraising events
2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?
b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

Table with 6 columns: (i) Name and address of individual or entity (fundraiser), (ii) Activity, (iii) Did fundraiser have custody or control of contributions?, (iv) Gross receipts from activity, (v) Amount paid to (or retained by) fundraiser listed in col. (i), (vi) Amount paid to (or retained by) organization. Includes rows 1-10 and a Total row.

- 3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

|                 |  | (a) Event #1<br>MOONLIGHT & MUSIC<br>(event type) | (b) Event #2<br>(event type) | (c) Other events<br>None<br>(total number) | (d) Total events<br>(add col. (a) through<br>col. (c)) |
|-----------------|--|---|------------------------------|--|--|
|                 |  |   |                              |  |  |
| Revenue         | <b>1</b> Gross receipts . . . . .  | 214,335.  |                              |  | 214,335.   |
|                 | <b>2</b> Less: Contributions . . . . .   | 92,780.   |                              |  | 92,780.  |
|                 | <b>3</b> Gross income (line 1<br>minus line 2) . . . . .                         | 121,555.  |                              |  | 121,555.   |
| Direct Expenses | <b>4</b> Cash prizes . . . . .   | 0.  |                              |  | 0.   |
|                 | <b>5</b> Noncash prizes . . . . .  | 350.  |                              |  | 350.   |
|                 | <b>6</b> Rent/facility costs . . . . .   | 20,613.   |                              |  | 20,613.  |
|                 | <b>7</b> Food and beverages . . . . .  | 32,291.   |                              |  | 32,291.  |
|                 | <b>8</b> Entertainment . . . . .   | 3,838.  |                              |  | 3,838.   |
|                 | <b>9</b> Other direct expenses . . . . .   | 77,873.   |                              |  | 77,873.  |
|                 | <b>10</b> Direct expense summary. Add lines 4 through 9 in column (d) . . . . .  |   |                              |  | 134,965.   |
|                 | <b>11</b> Net income summary. Subtract line 10 from line 3, column (d) . . . . . |   |                              |  | -13,410.   |
|                 |  |   |                              |  |  |
|                 |  |   |                              |  |  |

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

|                 |   | (a) Bingo   | (b) Pull tabs/instant<br>bingo/progressive bingo                    | (c) Other gaming  | (d) Total gaming (add<br>col. (a) through col. (c)) |
|-----------------|---|---|---|---|---|
|                 |   |   |   |   |   |
| Revenue         | <b>1</b> Gross revenue . . . . .  |   |   |   |   |
|                 |   |   |   |   |   |
| Direct Expenses | <b>2</b> Cash prizes . . . . .  |   |   |   |   |
|                 | <b>3</b> Noncash prizes . . . . .   |   |   |   |   |
|                 | <b>4</b> Rent/facility costs . . . . .  |   |   |   |   |
|                 | <b>5</b> Other direct expenses . . . . .  |   |   |   |   |
|                 |   |   |   |   |   |
|                 | <b>6</b> Volunteer labor . . . . .  | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No |   |
|                 | <b>7</b> Direct expense summary. Add lines 2 through 5 in column (d) . . . . .        |   |   |   |   |
|                 | <b>8</b> Net gaming income summary. Subtract line 7 from line 1, column (d) . . . . . |   |   |   |   |

**9** Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

**a** Is the organization licensed to conduct gaming activities in each of these states? . . . . . ☐ Yes ☐ No

**b** If "No," explain: \_\_\_\_\_

**10a** Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? . . . . . ☐ Yes ☐ No

**b** If "Yes," explain: \_\_\_\_\_

- |           |   |                              |                             |
|-----------|---|------------------------------|-----------------------------|
| <b>11</b> | Does the organization conduct gaming activities with nonmembers?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <b>12</b> | Is the organization a grantor, beneficiary, or trustee of a trust; or a member of a partnership or other entity formed to administer charitable gaming? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <b>13</b> | Indicate the percentage of gaming activity conducted in:  |                              |                             |
| <b>a</b>  | The organization's facility   | <b>13a</b>                   | %                           |
| <b>b</b>  | An outside facility   | <b>13b</b>                   | %                           |
| <b>14</b> | Enter the name and address of the person who prepares the organization's gaming/special events books and records:                                       |                              |                             |

Name \_\_\_\_\_

Address \_\_\_\_\_

- 15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No
- b** If "Yes," enter the amount of gaming revenue received by the organization \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party \$ \_\_\_\_\_
- c** If "Yes," enter the name and address of the third party: \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

- 16** Gaming manager information:

Name

Gaming manager compensation \$ \_\_\_\_\_

| Description of services provided | Quantity | Unit price | Total price |
|----------------------------------|----------|------------|-------------|
|                                  |          |            |             |
|                                  |          |            |             |
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|                                  |          |            |             |
|                                  |          |            |             |

☐ Director/officer☐ Employee☐ Independent contractor

- 17** Mandatory distributions:

- a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? . . . . . ☐ **Yes** ☐ **No**
- b** Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year . . . . . \$

**Part IV** **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public
Inspection

Name of the organization: NATIONAL TROPICAL BOTANICAL GARDEN
Employer identification number: 52-6057064

Part I General Information on Grants and Assistance
1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? [X] Yes [ ] No
2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

Table with 8 columns: (a) Name and address of organization or government, (b) EIN, (c) IRC section (if applicable), (d) Amount of cash grant, (e) Amount of noncash assistance, (f) Method of valuation (book, FMV, appraisal, other), (g) Description of noncash assistance, (h) Purpose of grant or assistance. Row 1 contains data for FLORIDA INTERNATIONAL UNIVERSITY.

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table
3 Enter total number of other organizations listed in the line 1 table

**Part III** **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of noncash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---------------------------------|--------------------------|--------------------------|----------------------------------|---|---------------------------------------|
| 1 HIGHSCHOOL TEACHER TRAINING   | 6                        | 30,000.                  |                                  |   |                                       |
| 2                               |                          |                          |                                  |   |                                       |
| 3                               |                          |                          |                                  |   |                                       |
| 4                               |                          |                          |                                  |   |                                       |
| 5                               |                          |                          |                                  |   |                                       |
| 6                               |                          |                          |                                  |   |                                       |
| 7                               |                          |                          |                                  |   |                                       |

|                |  |
|----------------|--|
| <b>Part IV</b> | <b>Supplemental Information.</b> Provide the information required in Part I, line 2; Part III, column (b); and any other additional information. |
|----------------|--|

[illegible]



SCHEDULE J  
(Form 990)

(Rev. December 2024)

Department of the Treasury  
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest  
Compensated Employees  
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.  
Attach to Form 990.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

Open to Public  
Inspection

Name of the organization

NATIONAL TROPICAL BOTANICAL GARDEN

Employer identification number

52-6057064

Part I Questions Regarding Compensation

|   | Yes                                 | No   |
|---|-------------------------------------|--|
| <b>1a</b> Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.<br><div><input type="checkbox"/> First-class or charter travel<br/><input type="checkbox"/> Travel for companions<br/><input type="checkbox"/> Tax indemnification and gross-up payments<br/><input type="checkbox"/> Discretionary spending account</div> <div><input type="checkbox"/> Housing allowance or residence for personal use<br/><input type="checkbox"/> Payments for business use of personal residence<br/><input type="checkbox"/> Health or social club dues or initiation fees<br/><input type="checkbox"/> Personal services (such as maid, chauffeur, chef)</div> |                                     |  |
| <b>b</b> If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain . . . . .   | <b>1b</b>                           |  |
| <b>2</b> Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? . . . . .   | <b>2</b>                            |  |
| <b>3</b> Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.<br><div><input type="checkbox"/> Compensation committee<br/><input type="checkbox"/> Independent compensation consultant<br/><input type="checkbox"/> Form 990 of other organizations</div> <div><input type="checkbox"/> Written employment contract<br/><input type="checkbox"/> Compensation survey or study<br/><input type="checkbox"/> Approval by the board or compensation committee</div>  |                                     |  |
| <b>4</b> During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:<br><b>a</b> Receive a severance payment or change-of-control payment? . . . . .<br><b>b</b> Participate in or receive payment from a supplemental nonqualified retirement plan? . . . . .<br><b>c</b> Participate in or receive payment from an equity-based compensation arrangement? . . . . .<br>If "Yes" to any of lines 4a–c, list the persons and provide the applicable amounts for each item in Part III.   | <b>4a</b><br><b>4b</b><br><b>4c</b> | <br><br><br><b>x</b><br><b>x</b><br><b>x</b> |
| <b>Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5–9.</b>   |                                     |  |
| <b>5</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:<br><b>a</b> The organization? . . . . .<br><b>b</b> Any related organization? . . . . .<br>If "Yes" on line 5a or 5b, describe in Part III.   | <b>5a</b><br><b>5b</b>              | <br><br><b>x</b><br><b>x</b>                 |
| <b>6</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:<br><b>a</b> The organization? . . . . .<br><b>b</b> Any related organization? . . . . .<br>If "Yes" on line 6a or 6b, describe in Part III.   | <b>6a</b><br><b>6b</b>              | <br><br><b>x</b><br><b>x</b>                 |
| <b>7</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III . . . . .  | <b>7</b>                            | <b>x</b>                                     |
| <b>8</b> Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III . . . . .  | <b>8</b>                            | <b>x</b>                                     |
| <b>9</b> If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? . . . . .   | <b>9</b>                            |  |

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)–(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

| (A) Name and Title |                                     | (B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)–(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|--------------------|-------------------------------------|--|-------------------------------------|-------------------------------------|--|-------------------------|---------------------------------|---|
|                    |                                     | (i) Base compensation  | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |  |                         |                                 |   |
| 1                  | JANET L. MAYFIELD<br>CEO & DIRECTOR | (i) 173,319.   | (ii) 0.                             | (iii) 0.                            | 5,992.   | 13,535.                 | 192,846.                        | 0.  |
|                    |                                     | (ii) 0.  | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| 2                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 3                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 4                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 5                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 6                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 7                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 8                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 9                  |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 10                 |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 11                 |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 12                 |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 13                 |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 14                 |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 15                 |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |
| 16                 |                                     | (i)  | (ii)                                |                                     |  |                         |                                 |   |
|                    |                                     | (ii)   |                                     |                                     |  |                         |                                 |   |

**Part III**    **Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Pt I Line 3: THE GARDEN HAS A CEO COMPENSATION COMMITTEE THAT IS COMPRISED OF THE CHAIRMAN OF THE BOARD AND OTHER APPOINTED TRUSTEES. THE COMMITTEE MEETS ANNUALLY AND REVIEWS CEO COMPENSATION STATISTICS OF SIMILAR BOTANICAL GARDENS AND OTHER DATA TO DETERMINE THE ANNUAL SALARY AND BENEFIT PACKAGE (INITIALLY) AND ANY INCREASES TO IT (OTHER THAN ANNUAL BUDGETED COST OF LIVING INCREASE)BASED ON PERFORMANCE.

**SCHEDULE M**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Noncash Contributions**

Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2024**

**Open to Public  
Inspection**

Name of the organization

NATIONAL TROPICAL BOTANICAL GARDEN

Employer identification number

52-6057064

**Part I** **Types of Property**

|  | (a)<br>Check if<br>applicable | (b)<br>Number of contributions or<br>items contributed | (c)<br>Noncash contribution<br>amounts reported on<br>Form 990, Part VIII, line 1g | (d)<br>Method of determining<br>noncash contribution amounts |
|--|-------------------------------|--|--|--|
| 1 Art—Works of art . . . . .   |                               |  |  |  |
| 2 Art—Historical treasures . . . . .                                       |                               |  |  |  |
| 3 Art—Fractional interests . . . . .                                       |                               |  |  |  |
| 4 Books and publications . . . . .   |                               |  | 2,552.   | FAIR MARKET VALUE  |
| 5 Clothing and household<br>goods . . . . .                                |                               |  |  |  |
| 6 Cars and other vehicles . . . . .  |                               |  |  |  |
| 7 Boats and planes . . . . .   |                               |  |  |  |
| 8 Intellectual property . . . . .  |                               |  |  |  |
| 9 Securities—Publicly traded . . . . .                                     |                               | 12   | 130,746.   | MARKET VALUE   |
| 10 Securities—Closely held stock . . . . .                                 |                               |  |  |  |
| 11 Securities—Partnership, LLC,<br>or trust interests . . . . .            |                               |  |  |  |
| 12 Securities—Miscellaneous . . . . .                                      |                               |  |  |  |
| 13 Qualified conservation<br>contribution—Historic<br>structures . . . . . |                               |  |  |  |
| 14 Qualified conservation<br>contribution—Other . . . . .                  |                               |  |  |  |
| 15 Real estate—Residential . . . . .                                       |                               | 1  | 800,000.   | MARKET VALUE   |
| 16 Real estate—Commercial . . . . .  |                               |  |  |  |
| 17 Real estate—Other . . . . .   |                               |  |  |  |
| 18 Collectibles . . . . .  |                               |  |  |  |
| 19 Food inventory . . . . .  |                               |  |  |  |
| 20 Drugs and medical supplies . . . . .                                    |                               |  |  |  |
| 21 Taxidermy . . . . .   |                               |  |  |  |
| 22 Historical artifacts . . . . .  |                               |  |  |  |
| 23 Scientific specimens . . . . .  |                               |  |  |  |
| 24 Archeological artifacts . . . . .                                       |                               |  |  |  |
| 25 Other (SUPPLIES . . . . .)  |                               | 150  | 8,913.   | FAIR MARKET VALUE  |
| 26 Other (AIRLINE TICKETS . . . . .)                                       |                               | 60   | 12,000.  | MARKET VALUE   |
| 27 Other (PRIZES/SILENT AUCTION . . . . .)                                 |                               | 143  | 50,444.  | FAIR MARKET VALUE  |
| 28 Other (INVENTORY . . . . .)   |                               | 77   | 883.   | FAIR MARKET VALUE  |

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement . . . . .

|    |  |
|----|--|
| 29 |  |
|----|--|

30a During the year, did the organization receive by contribution any property reported on Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? . . . . .

|     | Yes | No |
|-----|-----|----|
| 30a |     | x  |

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions? . . . . .

|    |   |  |
|----|---|--|
| 31 | x |  |
|----|---|--|

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? . . . . .

|     |  |   |
|-----|--|---|
| 32a |  | x |
|-----|--|---|

b If "Yes," describe in Part II.

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.

|  |  |  |
|--|--|--|
|  |  |  |
|--|--|--|

## Part II

**Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

[illegible]

|                                    |                                |
|------------------------------------|--------------------------------|
| Name of the organization           | Employer identification number |
| NATIONAL TROPICAL BOTANICAL GARDEN | 52-6057064                     |

Pt VI, Line 11b: THE CFO PREPARES THE TAX RETURN AND SENDS IT TO THE GARDEN'S CPA FIRM TO REVIEW. THE REVIEWED TAX RETURN IS THEN SENT TO THE CFO AND THE GOVERNING BOARD MEMBERS. ANY QUESTIONS, COMMENTS OR ADDITIONS ARE COMMUNICATED TO THE CFO AND ARE RESOLVED PRIOR TO FILING THE RETURN.

Pt VI, Line 12c: A CONFLICT OF INTEREST QUESTIONNAIRE IS REQUIRED TO BE COMPLETED BY ALL TRUSTEES, OFFICERS, AND KEY EMPLOYEES OF NTBG ON AN ANNUAL BASIS TO DETERMINE WHETHER ANY TRANSACTIONS COULD RESULT IN A CONFLICT OF INTEREST. THE COMPLETED FORMS ARE THEN SENT TO THE CORPORATE SECRETARY FOR REVIEW, AND ANY POTENTIAL CONFLICTS ARE DISCUSSED WITH THE CEO TO DETERMINE ANY NECESSARY FURTHER ACTION.

IN ADDITION, IF AT ANY POINT DURING THE YEAR SHOULD THERE BE A POTENTIAL FOR A COI, TRUSTEES ARE REQUIRED TO DISCLOSE THIS TO THE CHAIRMAN OF THE BOARD OF TRUSTEES AND A REVIEW OF THE SITUATION IS CONDUCTED.

Pt VI, Line 15a: NTBG'S BOARD OF TRUSTEES IN 2007 CREATED A COMPENSATION COMMITTEE AND APPOINTED CERTAIN TRUSTEES TO BE ITS MEMBERS, INCLUDING THE CHAIRMAN OF THE BOARD. THIS COMMITTEE IS RESPONSIBLE FOR DETERMINING A REASONABLE AND APPROPRIATE COMPENSATION PACKAGE FOR NTBG'S CEO. THIS COMMITTEE, CONSISTENT WITH THE ORG'S PHILOSOPHY, PRINCIPLES, MISSION, AND OPERATIONS, REVIEWS DATA REGARDING THE ANNUAL SALARY AND OTHER MONETARY BENEFITS FOR OFFICERS HOLDING SIMILAR POSITIONS AT COMPARABLE BOTANICAL GARDENS, AND THE COMMITTEE USES THIS DATA AND OTHER AVAILABLE INFORMATION (INCLUDING EVALUATION OF JOB PERFORMANCE) TO MAKE ITS DETERMINATION AS TO THE ANNUAL SALARY AND BENEFITS FOR THE CEO. THE CHAIRMAN OF THE BOARD THEN REPORTS ITS DELIBERATIONS AND DETERMINATIONS TO THE BOARD OF TRUSTEES. THE COMPENSATION COMMITTEE LAST MET IN AUGUST 0F 2024. THE OTHER KEY OFFICOR WHO RECEIVES COMPENSATION IS THE CFO/COO. THE CEO IS RESPONSIBLE FOR DETERMINING COMPENSATION FOR THIS OFFICER.

Pt VI, Line 1a: DURING PERIODS BETWEEN BOARD OF TRUSTEE MEETINGS, THE BOARD HAS AUTHORIZED THE EXECUTIVE COMMITTEE TO ACT ON ITS BEHALF. ALL MEMBERS OF THE EXECUTIVE COMMITTEE ARE TRUSTEES (VOTING MEMBERS).

Pt VI, Line 19: THE GARDEN MAKES ITS GOVERNING DOCUMENTS AND CONFLICT OF INTEREST POLICY AVAILABLE UPON REQUEST. THE GARDEN'S FINANCIAL STATEMENTS ARE AVAILABLE FOR PUBLIC INSPECTION UPON REQUEST AND ARE ALSO POSTED ON ITS WEBSITE.

Pt XI: ROUNDING -4  
Pt VI, Section C, Line 17:  
State: FL

SCHEDULE R
(Form 990)

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public
Inspection

Name of the organization

NATIONAL TROPICAL BOTANICAL GARDEN

Employer identification number

52-6057064

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

| (a)<br>Name, address, and EIN (if applicable) of disregarded entity | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Total income | (e)<br>End-of-year assets | (f)<br>Direct controlling entity |
|---|-------------------------|--|---------------------|---------------------------|----------------------------------|
| (1)   |                         |  |                     |                           |                                  |
| (2)   |                         |  |                     |                           |                                  |
| (3)   |                         |  |                     |                           |                                  |
| (4)   |                         |  |                     |                           |                                  |
| (5)   |                         |  |                     |                           |                                  |
| (6)   |                         |  |                     |                           |                                  |

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

| (a)<br>Name, address, and EIN of related organization                                    | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Exempt Code section | (e)<br>Public charity status (if section 501(c)(3)) | (f)<br>Direct controlling entity | (g)<br>Section 512(b)(13) controlled entity? |    |
|--|-------------------------|--|----------------------------|---|----------------------------------|--|----|
|  |                         |  |                            |   |                                  | Yes  | No |
| (1) JOHN T. WATERHOUSE TRUST 99-6048710<br>FIRST HAWAIIAN BANK, PO BOX HONOLULU HI 96811 | SUPPORT NTBG            | HI   | 501(C)(3)                  | 11D   | N/A                              | X  |    |
| (2)  |                         |  |                            |   |                                  |  |    |
| (3)  |                         |  |                            |   |                                  |  |    |
| (4)  |                         |  |                            |   |                                  |  |    |
| (5)  |                         |  |                            |   |                                  |  |    |
| (6)  |                         |  |                            |   |                                  |  |    |
| (7)  |                         |  |                            |   |                                  |  |    |

Part III

Identification of Related Organizations Taxable as a Partnership. Complete if the organization answered “Yes” on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

| (a)<br>Name, address, and EIN of<br>related organization | (b)<br>Primary activity | (c)<br>Legal<br>domicile<br>(state or<br>foreign<br>country) | (d)<br>Direct controlling<br>entity | (e)<br>Predominant<br>income (related,<br>unrelated,<br>excluded from<br>tax under<br>sections 512—514) | (f)<br>Share of total<br>income | (g)<br>Share of end-of-<br>year assets | (h)<br>Disproportionate<br>allocations? |    | (i)<br>Code V—UBI<br>amount in box 20<br>of Schedule K-1<br>(Form 1065) | (j)<br>General or<br>managing<br>partner? |    | (k)<br>Percentage<br>ownership |
|--|-------------------------|--|-------------------------------------|---|---------------------------------|--|---|----|---|---|----|--------------------------------|
|  |                         |  |                                     |   |                                 |  | Yes                                     | No |   | Yes                                       | No |                                |
| (1)  |                         |  |                                     |   |                                 |  |   |    |   |   |    |                                |
| (2)  |                         |  |                                     |   |                                 |  |   |    |   |   |    |                                |
| (3)  |                         |  |                                     |   |                                 |  |   |    |   |   |    |                                |
| (4)  |                         |  |                                     |   |                                 |  |   |    |   |   |    |                                |
| (5)  |                         |  |                                     |   |                                 |  |   |    |   |   |    |                                |
| (6)  |                         |  |                                     |   |                                 |  |   |    |   |   |    |                                |
| (7)  |                         |  |                                     |   |                                 |  |   |    |   |   |    |                                |

Part IV

Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered “Yes” on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a)<br>Name, address, and EIN of related organization   | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or foreign country) | (d)<br>Direct controlling<br>entity | (e)<br>Type of entity<br>(C corp, S corp, or trust) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year assets | (h)<br>Percentage<br>ownership | (i)<br>Section 512(b)(13)<br>controlled<br>entity? |    |
|---|-------------------------|---|-------------------------------------|---|---------------------------------|---------------------------------------|--------------------------------|--|----|
|   |                         |   |                                     |   |                                 |                                       |                                | Yes  | No |
| (1) CHARITABLE REMAINDER TRUST 36-6847957<br>C/O JP MORGAN BANK, 10 S. DEARBORN CHICAGO IL 60603      | CHARITABLE GIVING       | WI  | NTBG                                | T   |                                 |                                       |                                |  |    |
| (2) CHARITABLE REMAINDER TRUST 36-6613174<br>C/O JP MORGAN BANK, 10 S. DEARBORN CHICAGO IL 60603      | CHARTABLE GIVING        | CA  | NTBG                                | T   |                                 |                                       |                                |  |    |
| (3) CHARITABLE REMAINDER TRUST 94-6768199<br>C/O UNION BANK, 350 CALIFORNIA ST SAN FRANCISCO CA 94104 | CHARITABLE GIVING       | CA  |                                     | T   |                                 |                                       |                                |  |    |
| (4)   |                         |   |                                     |   |                                 |                                       |                                |  |    |
| (5)   |                         |   |                                     |   |                                 |                                       |                                |  |    |
| (6)   |                         |   |                                     |   |                                 |                                       |                                |  |    |
| (7)   |                         |   |                                     |   |                                 |                                       |                                |  |    |



**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

|   | Yes       | No |
|---|-----------|----|
| <b>1</b> During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II–IV?                          |           |    |
| <b>a</b> Receipt of <b>(i)</b> interest, <b>(ii)</b> annuities, <b>(iii)</b> royalties, or <b>(iv)</b> rent from a controlled entity . . . . .  | <b>1a</b> | X  |
| <b>b</b> Gift, grant, or capital contribution to related organization(s) . . . . .  | <b>1b</b> | X  |
| <b>c</b> Gift, grant, or capital contribution from related organization(s) . . . . .  | <b>1c</b> | X  |
| <b>d</b> Loans or loan guarantees to or for related organization(s) . . . . .   | <b>1d</b> | X  |
| <b>e</b> Loans or loan guarantees by related organization(s) . . . . .  | <b>1e</b> | X  |
| <b>f</b> Dividends from related organization(s) . . . . .   | <b>1f</b> | X  |
| <b>g</b> Sale of assets to related organization(s) . . . . .  | <b>1g</b> | X  |
| <b>h</b> Purchase of assets from related organization(s) . . . . .  | <b>1h</b> | X  |
| <b>i</b> Exchange of assets with related organization(s) . . . . .  | <b>1i</b> | X  |
| <b>j</b> Lease of facilities, equipment, or other assets to related organization(s) . . . . .   | <b>1j</b> | X  |
| <b>k</b> Lease of facilities, equipment, or other assets from related organization(s) . . . . .   | <b>1k</b> | X  |
| <b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) . . . . .   | <b>1l</b> | X  |
| <b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) . . . . .  | <b>1m</b> | X  |
| <b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) . . . . .  | <b>1n</b> | X  |
| <b>o</b> Sharing of paid employees with related organization(s) . . . . .   | <b>1o</b> | X  |
| <b>p</b> Reimbursement paid to related organization(s) for expenses . . . . .   | <b>1p</b> | X  |
| <b>q</b> Reimbursement paid by related organization(s) for expenses . . . . .   | <b>1q</b> | X  |
| <b>r</b> Other transfer of cash or property to related organization(s) . . . . .  | <b>1r</b> | X  |
| <b>s</b> Other transfer of cash or property from related organization(s) . . . . .  | <b>1s</b> | X  |
| <b>2</b> If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds. |           |    |

| (a)<br>Name of related organization | (b)<br>Transaction<br>type (a–s) | (c)<br>Amount involved | (d)<br>Method of determining amount involved |
|-------------------------------------|----------------------------------|------------------------|--|
| (1) CHARITABLE REMAINDER TRUSTS (3) | C                                |                        | CASH RECEIVED                                |
| (2)                                 |                                  |                        |  |
| (3)                                 |                                  |                        |  |
| (4)                                 |                                  |                        |  |
| (5)                                 |                                  |                        |  |
| (6)                                 |                                  |                        |  |

**Part VI**   **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered “Yes” on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| (a)<br>Name, address, and EIN of entity | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or foreign<br>country) | (d)<br>Predominant<br>income (related,<br>unrelated, excluded<br>from tax under<br>sections 512–514) | (e)<br>Are all partners<br>section<br>501(c)(3)<br>organizations? |    | (f)<br>Share of<br>total income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Disproportionate<br>allocations? |    | (i)<br>Code V—UBI<br>amount in box 20<br>of Schedule K-1<br>(Form 1065) | (j)<br>General or<br>managing<br>partner? |    | (k)<br>Percentage<br>ownership |
|---|-------------------------|--|--|---|----|---------------------------------|--|---|----|---|---|----|--------------------------------|
|   |                         |  |  | Yes   | No |                                 |  | Yes                                     | No |   | Yes                                       | No |                                |
| (1) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (2) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (3) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (4) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (5) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (6) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (7) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (8) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (9) .....                               |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (10) .....                              |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (11) .....                              |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (12) .....                              |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (13) .....                              |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (14) .....                              |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (15) .....                              |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |
| (16) .....                              |                         |  |  |   |    |                                 |  |   |    |   |   |    |                                |

## Part VII

## Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

[illegible]

IRS E-file Signature Authorization  
for a Tax Exempt Entity

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

For calendar year 2024, or fiscal year beginning \_\_\_\_\_, 2024, and ending \_\_\_\_\_, 20\_\_\_\_\_

Do not send to the IRS. Keep for your records.  
Go to [www.irs.gov/Form8879TE](http://www.irs.gov/Form8879TE) for the latest information.

2024

Name of filer

NATIONAL TROPICAL BOTANICAL GARDEN

EIN or SSN

52-6057064

Name and title of officer or person subject to tax

Tamara A Rollins, CFO

## Part I Type of Return and Return Information

Check the box for the return for which you are using this Form 8879-TE and enter the applicable amount, if any, from the return. Form 8038-CP and Form 5330 filers may enter dollars and cents. For all other forms, enter whole dollars only. If you check the box on line 1a, 2a, 3a, 4a, 5a, 6a, 7a, 8a, 9a, or 10a below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, 5b, 6b, 7b, 8b, 9b, or 10b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. Do not complete more than one line in Part I.

|                             |                                     |  |                |
|-----------------------------|-------------------------------------|--|----------------|
| 1a Form 990 check here      | <input checked="" type="checkbox"/> | b Total revenue, if any (Form 990, Part VIII, column (A), line 12)     | 1b 29,167,793. |
| 2a Form 990-EZ check here   | <input type="checkbox"/>            | b Total revenue, if any (Form 990-EZ, line 9)                          | 2b             |
| 3a Form 1120-POL check here | <input type="checkbox"/>            | b Total tax (Form 1120-POL, line 22)                                   | 3b             |
| 4a Form 990-PF check here   | <input type="checkbox"/>            | b Tax based on investment income (Form 990-PF, Part V, line 5)         | 4b             |
| 5a Form 8868 check here     | <input type="checkbox"/>            | b Balance due (Form 8868, line 3c)                                     | 5b             |
| 6a Form 990-T check here    | <input type="checkbox"/>            | b Total tax (Form 990-T, Part III, line 4)                             | 6b             |
| 7a Form 4720 check here     | <input type="checkbox"/>            | b Total tax (Form 4720, Part III, line 1)                              | 7b             |
| 8a Form 5227 check here     | <input type="checkbox"/>            | b FMV of assets at end of tax year (Form 5227, Item D)                 | 8b             |
| 9a Form 5330 check here     | <input type="checkbox"/>            | b Tax due (Form 5330, Part II, line 19)                                | 9b             |
| 10a Form 8038-CP check here | <input type="checkbox"/>            | b Amount of credit payment requested (Form 8038-CP, Part III, line 22) | 10b            |

## Part II Declaration and Signature Authorization of Officer or Person Subject to Tax

Under penalties of perjury, I declare that ☒ I am an officer of the above entity or ☐ I am a person subject to tax with respect to (name of entity) \_\_\_\_\_, (EIN) \_\_\_\_\_ and that I have examined a copy of the 2024 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

## PIN: check one box only

☒ I authorize Tamara A. Rollins, CPA to enter my PIN 11031 as my signature  
ERO firm name Enter five numbers, but do not enter all zeros

on the tax year 2024 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☐ As an officer or person subject to tax with respect to the entity, I will enter my PIN as my signature on the tax year 2024 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax

Date 11/07/2025

## Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

99188705132

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2024 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature

Date

ERO Must Retain This Form — See Instructions  
Do Not Submit This Form to the IRS Unless Requested To Do So

Additional Information From 2024 Federal Exempt Tax Return

Schedule G: Supplemental Information Regarding Fundraising or Gaming Activities

Event 1 Other Direct Exp.

Itemization Statement

| Description                           | Amount  |
|---------------------------------------|---------|
| NON CASH DONATIONS FOR SILENT AUCTION | 62,122. |
| SUPPLIES, PRINTING, ADV, OTHER        | 8,946.  |
| GENERAL EXCISE TAX                    | 6,805.  |
| Total                                 | 77,873. |