PUBLIC DISCLOSURE COPY

Form **990**

Return of Organization Exempt From Income Tax

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* for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0047

2024

Open to Public Inspection

A For the 2024 calendar year, or tax year beginning 07/01 , 2024, and ending 06/30 , 20 25

B Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Doing business as

Number and street (or P.O. box if mail is not delivered to street address): 600 14TH STREET NW

Room/suite: 500

City or town, state or province, country, and ZIP or foreign postal code: WASHINGTON, DC 20005

D Employer identification number: 53-0210807

E Telephone number: (202) 588-6000

G Gross receipts $ 133,878,402

F Name and address of principal officer: CAROL QUILLEN
SAME AS C ABOVE

H(a) Is this a group return for subordinates? ☐ Yes ☑ No

H(b) Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. See instructions.

H(c) Group exemption number

I Tax-exempt status: ☑ 501(c)(3) ☐ 501(c) ( ) (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website: SAVINGPLACES.ORG

K Form of organization: ☑ Corporation ☐ Trust ☐ Association ☐ Other

L Year of formation: 1949

M State of legal domicile: DC

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities: THE NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES PROTECTS SIGNIFICANT PLACES REPRESENTING OUR DIVERSE CULTURAL EXPERIENCES BY TAKING DIRECT ACTION AND INSPIRING BROAD PUBLIC SUPPORT.

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3	Number of voting members of the governing body (Part VI, line 1a)	3	22
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	22
5	Total number of individuals employed in calendar year 2024 (Part V, line 2a)	5	369
6	Total number of volunteers (estimate if necessary)	6	704
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	1,944,820
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0

Revenue

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	74,357,526	69,324,920
9	Program service revenue (Part VIII, line 2g)	4,573,253	5,386,518
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	16,694,200	20,208,482
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	8,491,214	9,955,911
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	104,116,193	104,875,831

Expenses

13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	16,622,359	21,910,768
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	24,252,654	26,401,044
16a	Professional fundraising fees (Part IX, column (A), line 11e)	501,590	668,004
b	Total fundraising expenses (Part IX, column (D), line 25) 7,631,106		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	31,151,228	42,284,466
18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	72,527,831	91,264,282
19	Revenue less expenses. Subtract line 18 from line 12	31,588,362	13,611,549

Net Assets or Fund Balances

		Beginning of Current Year	End of Year
20	Total assets (Part X, line 16)	527,249,788	562,902,803
21	Total liabilities (Part X, line 26)	55,213,739	59,969,674
22	Net assets or fund balances. Subtract line 21 from line 20	472,036,049	502,933,129

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

DENISE WISE, VP, FIN & CONTROLLER
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name: TODD TERESCO	Preparer's signature	Date: 04/27/26	Check ☐ if self-employed	PTIN: P00247720
Firm's name: BDO USA			Firm's EIN: 13-5381590	
Firm's address: 8401 GREENSBORO DR STE 800, MCLEAN, VA 22102-3599			Phone no.: (703) 893-0600	

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

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III . . . . . ☑

1 Briefly describe the organization's mission:

THE NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES PROTECTS SIGNIFICANT PLACES REPRESENTING OUR DIVERSE CULTURAL EXPERIENCES BY TAKING DIRECT ACTION AND INSPIRING BROAD PUBLIC SUPPORT.

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 $ 34,886,236 including grants of $ 21,412,607) (Revenue $ 82,613)

HISTORIC PRESERVATION & CONSERVATION: PRESERVATION SERVICES INCLUDES:
1) WORK TO SAVE THREATENED HISTORIC PLACES ACROSS THE COUNTRY;
2) RESEARCH, INFORMATION AND TECHNICAL ASSISTANCE TO MEMBERS, PRIVATE AND PUBLIC ORGANIZATIONS, AND GOVERNMENT BODIES WITH RESPECT TO CONTEMPORARY PRESERVATION ISSUES AND REHABILITATION PROJECTS RELATED TO IMPORTANT HISTORIC BUILDINGS, LANDSCAPES, AND LANDMARKS;
3) FINANCIAL ASSISTANCE/GRANTS AND TECHNICAL SUPPORT THROUGH PROGRAMS INCLUDING THE AFRICAN AMERICAN CULTURAL HERITAGE ACTION FUND, THE BACKING HISTORIC SMALL RESTAURANTS, AND THE NATIONAL FUND FOR SACRED PLACES GRANT PROGRAMS; THESE PROGRAMS SUPPORT THE PRESERVATION OF HISTORIC BUILDINGS, LANDSCAPES, AND COLLECTIONS; PUBLIC INTERPRETATION OF HISTORIC PLACES; CAPACITY-BUILDING; PRESERVATION EDUCATION PROGRAMS, CONFERENCES, AND RETENTION OF PROFESSIONAL CONSULTANTS;
(SEE ON SCHEDULE O)

4b (Code:) (Expenses $ 34,048,225 including grants of $ 462,561) (Revenue $ 4,626,779)

(SEE ON SCHEDULE O)

4c (Code:) (Expenses $ 8,355,563 including grants of $ 35,600) (Revenue $ 413,014)

(SEE ON SCHEDULE O)

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

4e Total program service expenses 77,290,024

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	✔	
2	Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	2	✔	
3	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*	3		✔
4	**Section 501(c)(3) organizations.** 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*	4	✔	
5	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*	5		✔
6	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*	6	✔	
7	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*	7	✔	
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8	✔	
9	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*	9		✔
10	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*	10	✔	
11	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.			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI*	11a	✔	
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*	11b	✔	
c	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*	11c		✔
d	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*	11d		✔
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	✔	
f	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*	11f	✔	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a		✔
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*	12b	✔	
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		✔
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		✔
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*	14b	✔	
15	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*	15		✔
16	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*	16		✔
17	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	17	✔	
18	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*	18	✔	
19	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*	19		✔
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		✔
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	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*	21	✔	

Part IV Checklist of Required Schedules *(continued)*

			Yes	No
22	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*	22	✔	
23	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*	23	✔	
24a	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*	24a		✔
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		✔
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*	25b		✔
26	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*	26		✔
27	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*	27		✔
28	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).			
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? *If "Yes," complete Schedule L, Part IV*	28a		✔
b	A family member of any individual described in line 28a? *If "Yes," complete Schedule L, Part IV*	28b		✔
c	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*	28c		✔
29	Did the organization receive more than $25,000 in noncash contributions? *If "Yes," complete Schedule M*	29	✔	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		✔
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		✔
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		✔
33	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*	33	✔	
34	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*	34	✔	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	✔	
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*	35b	✔	
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		✔
37	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*	37		✔
38	Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? **Note:** All Form 990 filers are required to complete Schedule O	38	✔	

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
1a	Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	394		
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c		✔	

Part V Statements Regarding Other IRS Filings and Tax Compliance *(continued)*

				Yes	No
2a	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	2a	369		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?		2b	✔	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?		3a	✔	
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation on Schedule O*		3b	✔	
4a	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)?		4a		✔
b	If "Yes," enter the name of the foreign country ---------- See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		5a		✔
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		5b		✔
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		5c		
6a	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?		6a	✔	
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		6b	✔	
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	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?		7a	✔	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		7b	✔	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		7c		✔
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		7e		✔
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		7f		✔
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		7g		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		7h		
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		8		✔
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the sponsoring organization make any taxable distributions under section 4966?		9a		✔
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		9b		✔
10	**Section 501(c)(7) organizations.** Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	**Section 501(c)(12) organizations.** Enter:				
a	Gross income from members or shareholders	11a			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?		12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state? **Note:** See the instructions for additional information the organization must report on Schedule O.		13a		
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	13b			
c	Enter the amount of reserves on hand	13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?		14a		✔
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation on Schedule O*		14b		
15	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? If "Yes," see the instructions and file Form 4720, Schedule N.		15		✔
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.		16		✔
17	**Section 501(c)(21) organizations.** 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? If "Yes," complete Form 6069.		17		

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
1a	Enter the number of voting members of the governing body at the end of the tax year . . 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.	1a	22		
b	Enter the number of voting members included on line 1a, above, who are independent .	1b	22		
2	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?	2			✔
3	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? .	3			✔
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4			✔
5	Did the organization become aware during the year of a significant diversion of the organization's assets? .	5			✔
6	Did the organization have members or stockholders?	6		✔	
7a	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?	7a		✔	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b			✔
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a	The governing body?	8a		✔	
b	Each committee with authority to act on behalf of the governing body?	8b		✔	
9	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*	9			✔

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

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a		✔
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?	10b		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	✔	
b	Describe on Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a	✔	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	✔	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe on Schedule O how this was done*	12c	✔	
13	Did the organization have a written whistleblower policy?	13	✔	
14	Did the organization have a written document retention and destruction policy?	14	✔	
15	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?			
a	The organization's CEO, Executive Director, or top management official	15a	✔	
b	Other officers or key employees of the organization	15b	✔	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	✔	
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?	16b	✔	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed AR, CA, FL, GA, HI, (CONTINUED ON SCHEDULE O)

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.

DENISE WISE, 600 14TH ST NW SUITE 500, WASHINGTON, DC 20005, (202) 588-6000

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) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/ 1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/ 1099-MISC/ 1099-NEC)	(F) 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) CAROL QUILLEN	40.0									
PRESIDENT & CEO	0.0			✔				506,236	0	18,575
(2) JO ANN MCELWAIN	40.0									
CHIEF DEVELOPMENT OFFICER	0.0				✔			326,243	0	28,683
(3) TABITHA ALMQUIST	40.0									
CHIEF ADMINISTRATIVE OFFICER	0.0				✔			283,075	0	25,337
(4) THOMPSON M. MAYES	40.0									
CHIEF LEGAL OFFICER & CORPORATE SECRETARY	0.0			✔				269,136	0	34,099
(5) DEMOND LEGGS	40.0									
EXEC DIR, AACHAF & SR VP, NTHP	0.0				✔			250,230	0	23,938
(6) DENISE WISE	38.0									
VP OF FINANCE & CONTROLLER (FORMER INTERIM CFO 5-11/24)	2.0			✔				230,083	0	27,463
(7) PATRICIA WINTERTON	40.0									
VP OF PHILANTHROPY	0.0					✔		199,136	0	35,102
(8) OMAR EATON-MARTINEZ	40.0									
SR VP, HISTORIC SITES	0.0				✔			194,872	0	35,323
(9) SUSAN LATTANZI	40.0									
VP OF INFORMATION TECHNOLOGY & REAL ESTATE	0.0					✔		195,783	0	22,441
(10) ROBERT NIEWEG	40.0									
SR VP FOR PRESERVATION SERVICES & OUTREACH	0.0				✔			201,462	0	15,161
(11) MARIANNA KNIGHT	40.0									
FORMER VP, HUMAN RESOURCES (THRU 2/24)	0.0					✔		205,064	0	10,363
(12) SHAW SPRAGUE	40.0									
VP FOR GOVERNMENT RELATIONS	0.0				✔			177,505	0	34,165
(13) MICHELLE HORTON	40.0									
VP OF INSTITUTIONAL PARTNERSHIPS & STRATEGY	0.0					✔		202,137	0	8,404
(14) EDWARD WHITAKER	40.0									
ACTING CHIEF MARKETING OFFICER	0.0				✔			178,461	0	25,912

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/ 1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/ 1099-MISC/ 1099-NEC)	(F) 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) ELIZABETH S MERRITT	40.0									
DEPUTY GENERAL COUNSEL	0.0					✔		192,182	0	9,543
(16) ROSS M. BRADFORD	40.0									
ASSISTANT CORPORATE SECRETARY	0.0			✔				180,027	0	21,276
(17) PATRICIA M WOODWORTH	40.0									
FORMER CHIEF FINANCIAL OFFICER (THRU 5/24)	0.0						✔	150,431	0	144
(18) NATALIE ROBINSON	40.0									
CHIEF FINANCIAL OFFICER (AS OF 11/24)	0.0			✔				21,944	0	23
(19) JAY C. CLEMENS	2.0									
FORMER PRESIDENT & CEO (THRU 01/24) AND TRUSTEE (AS OF 02/24)	0.0	✔						8,874	0	2,585
(20) ELIZABETH KIRKLAND CAHILL	2.0									
VICE CHAIR, CHAIR ELECT AND GENERAL TRUSTEE	0.0	✔		✔				0	0	0
(21) PHOEBE TUDOR	2.0									
CHAIR AND GENERAL TRUSTEE	0.0	✔		✔				0	0	0
(22) ALISON K. HOAGLAND	2.0									
TRUSTEE	0.0	✔						0	0	0
(23) C.H. RANDOLPH LYON	2.0									
TRUSTEE (THRU 10/24)	0.0	✔						0	0	0
(24) CHARLES F. SAMS, III	2.0									
EX OFFICIO TRUSTEE (THRU 01/25)	0.0	✔						0	0	0
(25) (SEE PART VII CONTINUATION SHEET)										
1b Subtotal								3,972,881	0	378,537
c Total from continuation sheets to Part VII, Section A								0	0	0
d Total (add lines 1b and 1c)								3,972,881	0	378,537

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 71

			Yes	No
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**		✔

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) Name and business address	(B) Description of services	(C) Compensation
HOBBS, INC., 27 GROVE STREET, NEW CANAAN, CT 06840	CONSTRUCTION SERVICES	1,435,299
BERGLUND CONSTRUCTION COMPANY, 8410 S SOUTH CHICAGO AVENUE, CHICAGO, IL 60617	CONSTRUCTION SERVICES	581,386
SHENANDOAH PLANING MILL, 471 COLD STORAGE RD, CHARLES TOWN, WV 25414	CONSTRUCTION SERVICES	568,554
ALLEGRONE CONSTRUCTION CO, INC., 150 PITTSFIELD ROAD, LENOX, MA 01240	CONSTRUCTION SERVICES	526,567
DATAPRISE LLC, P.O. BOX 22645, NEW YORK, NY 10087	MANAGED IT SERVICES	429,839

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 30

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII . . . . . ☐

					(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512–514
Contributions, Gifts, Grants, and Other Similar Amounts	1a	Federated campaigns	1a	21,700				
	b	Membership dues	1b					
	c	Fundraising events	1c	471,960				
	d	Related organizations	1d					
	e	Government grants (contributions)	1e	1,095,066				
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	67,736,194				
	g	Noncash contributions included in lines 1a–1f	1g	$ 235,144				
	h	**Total.** Add lines 1a–1f			69,324,920			
Program Service Revenue			Business Code					
	2a	ADMISSION AND SPECIAL EVENTS	900099		4,253,289	3,488,539	764,750	0
	b	REIMBURSEMENT OF EXPENSES	900099		467,489	467,489	0	0
	c	CONTRACT SERVICES/COMMISSIONS	900099		401,628	401,628	0	0
	d	ADVERTISING	541800		264,112	0	264,112	0
	e							
	f	All other program service revenue			0	0	0	0
	g	**Total.** Add lines 2a–2f			5,386,518			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)			6,519,558	0	194,108	6,325,450
	4	Income from investment of tax-exempt bond proceeds						
	5	Royalties			1,328,084	0	417,428	910,656
			(i) Real	(ii) Personal				
	6a	Gross rents 6a	3,784,181					
	b	Less: rental expenses 6b	2,118,581					
	c	Rental income or (loss) 6c	1,665,600	0				
	d	Net rental income or (loss)			1,665,600	0	0	1,665,600
			(i) Securities	(ii) Other				
	7a	Gross amount from sales of assets other than inventory 7a	39,854,401					
	b	Less: cost or other basis and sales expenses 7b	26,165,477					
	c	Gain or (loss) 7c	13,688,924	0				
	d	Net gain or (loss)			13,688,924	0	0	13,688,924
	8a	Gross income from fundraising events (not including $ 471,960 of contributions reported on line 1c). See Part IV, line 18	8a	367,917				
	b	Less: direct expenses	8b	332,555				
	c	Net income or (loss) from fundraising events			35,362		0	35,362
	9a	Gross income from gaming activities. See Part IV, line 19	9a					
	b	Less: direct expenses	9b					
	c	Net income or (loss) from gaming activities						
	10a	Gross sales of inventory, less returns and allowances	10a	717,415				
	b	Less: cost of goods sold	10b	385,958				
	c	Net income or (loss) from sales of inventory			331,457	0	304,422	27,035
Miscellaneous Revenue			Business Code					
	11a	EQUITY INTEREST IN SUBSIDIARIES	900099		4,988,259	0	0	4,988,259
	b	EARNINGS ALLOCATED TO ENDOWMENTS HELD FO	900099		1,148,284	0	0	1,148,284
	c	INSURANCE LOSS REPAYMENTS	900099		412,870	0	0	412,870
	d	All other revenue	900099		45,995	0	0	45,995
	e	**Total.** Add lines 11a–11d			6,595,408			
	12	**Total revenue.** See instructions			104,875,831	4,357,656	1,944,820	29,248,435

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) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	21,840,768	21,840,768		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	70,000	70,000		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	3,428,599	1,941,821	928,950	557,828
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	18,388,640	12,546,650	2,268,850	3,573,140
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	776,406	496,592	125,696	154,118
9 Other employee benefits	2,191,273	1,406,447	356,939	427,887
10 Payroll taxes	1,616,126	1,051,756	264,170	300,200
11 Fees for services (nonemployees):				
a Management				
b Legal	30,737	21,385	5,700	3,652
c Accounting	264,230	0	264,230	0
d Lobbying	45,000	45,000	0	0
e Professional fundraising services. See Part IV, line 17	668,004			668,004
f Investment management fees	795,999	729,182	66,817	0
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	5,435,647	4,526,852	571,592	337,203
12 Advertising and promotion				
13 Office expenses	480,229	235,191	234,141	10,897
14 Information technology	1,598,350	1,232,774	206,103	159,473
15 Royalties				
16 Occupancy	2,915,147	2,348,317	234,836	331,994
17 Travel	1,101,420	827,486	113,973	159,961
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	776,620	776,620	0	0
20 Interest	140,035	52,514	87,521	0
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	806,771	650,160	92,577	64,034
23 Insurance	1,295,143	1,051,578	243,565	0
24 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 11g expenses on Schedule O.)				
a REAL ESTATE	12,382,213	12,382,213	0	0
b PROPERTY DEVELOPMENT	5,732,544	5,732,544	0	0
c ALL OTHER EXPENSES	4,981,234	4,382,030	271,412	327,792
d PRINTING	1,980,439	1,688,998	2,620	288,821
e All other expenses	1,522,708	1,253,146	3,460	266,102
25 **Total functional expenses.** Add lines 1 through 24e	91,264,282	77,290,024	6,343,152	7,631,106
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☑ 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) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing		0	1	0
	2	Savings and temporary cash investments		8,233,442	2	7,074,253
	3	Pledges and grants receivable, net		56,601,613	3	11,979,787
	4	Accounts receivable, net		3,436,186	4	2,289,167
	5	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		0	5	0
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		0	6	0
	7	Notes and loans receivable, net		243,735	7	113,273
	8	Inventories for sale or use		620,611	8	678,715
	9	Prepaid expenses and deferred charges		667,734	9	715,209
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 15,224,715			
	b	Less: accumulated depreciation	10b 9,956,417	5,763,326	10c	5,268,298
	11	Investments—publicly traded securities		119,453,307	11	178,044,560
	12	Investments—other securities. See Part IV, line 11		323,219,660	12	349,430,787
	13	Investments—program-related. See Part IV, line 11		0	13	0
	14	Intangible assets		0	14	0
	15	Other assets. See Part IV, line 11		9,010,174	15	7,308,754
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)		527,249,788	16	562,902,803
Liabilities	17	Accounts payable and accrued expenses		4,117,943	17	6,065,138
	18	Grants payable		12,598,528	18	16,888,762
	19	Deferred revenue		4,315,005	19	4,849,111
	20	Tax-exempt bond liabilities		0	20	0
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		0	21	0
	22	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		0	22	0
	23	Secured mortgages and notes payable to unrelated third parties		1,264,485	23	1,274,778
	24	Unsecured notes and loans payable to unrelated third parties		1,000,000	24	0
	25	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		31,917,778	25	30,891,885
	26	**Total liabilities.** Add lines 17 through 25		55,213,739	26	59,969,674
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ☑ and complete lines 27, 28, 32, and 33.**				
	27	Net assets without donor restrictions		113,096,512	27	116,226,143
	28	Net assets with donor restrictions		358,939,537	28	386,706,986
		Organizations that do not follow FASB ASC 958, check here ☐ and complete lines 29 through 33.				
	29	Capital stock or trust principal, or current funds		0	29	0
	30	Paid-in or capital surplus, or land, building, or equipment fund		0	30	0
	31	Retained earnings, endowment, accumulated income, or other funds		0	31	0
	32	Total net assets or fund balances		472,036,049	32	502,933,129
	33	Total liabilities and net assets/fund balances		527,249,788	33	562,902,803

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI . . . . . ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	104,875,831
2	Total expenses (must equal Part IX, column (A), line 25)	2	91,264,282
3	Revenue less expenses. Subtract line 2 from line 1	3	13,611,549
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	472,036,049
5	Net unrealized gains (losses) on investments	5	17,285,531
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	502,933,129

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII . . . . . ☐

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☑ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		✔
	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.			
	☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	✔	
	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.			
	☐ Separate basis ☑ Consolidated basis ☐ Both consolidated and separate basis			
c	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?	2c	✔	
	If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
3a	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?	3a	✔	
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	3b	✔	

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (Check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(25) CHRISTINA LEE BROWN TRUSTEE	2.0 0.0	✓						0	0	0
(26) COSBY HUNT EX OFFICIO TRUSTEE (THRU 09/24)	2.0 0.0	✓						0	0	0
(27) DAMIEN DWIN TRUSTEE	2.0 0.0	✓						0	0	0
(28) DANIELLE DEL SOL EX OFFICIO TRUSTEE	2.0 0.0	✓						0	0	0
(29) DAVID SCOTT PARKER TRUSTEE	2.0 0.0	✓						0	0	0
(30) DONNA COLSON TRUSTEE (AS OF 10/24)	2.0 0.0	✓						0	0	0
(31) DOUG BURGUM EX OFFICIO TRUSTEE (AS OF 05/25)	2.0 0.0	✓						0	0	0
(32) EDWARD I. TORREZ EX OFFICIO TRUSTEE	2.0 0.0	✓						0	0	0
(33) JENNIFER SKYLER TRUSTEE	2.0 0.0	✓						0	0	0
(34) JOE BEASLEY EX OFFICIO TRUSTEE (01/25-05/25)	2.0 0.0	✓						0	0	0
(35) JOEL EDWARD DANIES EX OFFICIO TRUSTEE (AS OF 10/24)	2.0 0.0	✓						0	0	0
(36) KAYWIN FELDMAN EX OFFICIO TRUSTEE	2.0 0.0	✓						0	0	0
(37) KELLY WILLIAMS TRUSTEE (AS OF 10/24)	2.0 0.0	✓						0	0	0
(38) MARTHA NELSON CHAIR (THRU 10/24)	2.0 0.0	✓						0	0	0
(39) PAMELA BONDI EX OFFICIO TRUSTEE (AS OF 04/25)	2.0 0.0	✓						0	0	0
(40) PETER KIES TRUSTEE	2.0 0.0	✓						0	0	0
(41) ROBERT JOSEPH VILA TRUSTEE	2.0 0.0	✓						0	0	0
(42) SAM DIXON TRUSTEE	2.0 0.0	✓						0	0	0
(43) SAMANTHA KLEIN FRANK EX OFFICIO TRUSTEE (THRU 04/25)	2.0 0.0	✓						0	0	0
(44) SHELLY JOON KEITH TRUSTEE (THRU 10/24)	2.0 0.0	✓						0	0	0

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (Check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(45) TONY GELDERMAN	2.0	✓						0	0	0
TRUSTEE	0.0									
(46) TRACY FRIST	2.0	✓						0	0	0
TRUSTEE	0.0									
(47) WILLIAM BATES	2.0	✓						0	0	0
TRUSTEE	0.0									

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* for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public Inspection

Name of the organization	Employer identification number
NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES	53-0210807

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 1/3% 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 1/3% 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? Yes	(iv) No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
(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
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	45,766,893	63,345,381	63,104,275	74,357,526	69,324,920	315,898,995
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0
3 The value of services or facilities furnished by a governmental unit to the organization without charge						0
4 **Total.** Add lines 1 through 3	45,766,893	63,345,381	63,104,275	74,357,526	69,324,920	315,898,995
5 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)						122,711,296
6 **Public support.** Subtract line 5 from line 4						193,187,700

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
7 Amounts from line 4	45,766,893	63,345,381	63,104,275	74,357,526	69,324,920	315,898,995
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	8,611,236	4,179,872	7,055,798	10,618,091	11,631,823	42,096,820
9 Net income from unrelated business activities, whether or not the business is regularly carried on	0	0	0	0	0	0
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	6,652,591	2,671,216	3,693,471	5,234,274	6,595,408	24,846,960
11 **Total support.** Add lines 7 through 10						382,842,775

12	Gross receipts from related activities, etc. (see instructions)	12	23,436,541

13 **First 5 years.** 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 **stop here** ☐

Section C. Computation of Public Support Percentage

14	Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f))	14	50.46 %
15	Public support percentage from 2023 Schedule A, Part II, line 14	15	51.46 %

16a **33 1/3% support test—2024.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here**. The organization qualifies as a publicly supported organization ☑

b **33 1/3% support test—2023.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

17a **10%-facts-and-circumstances test—2024.** 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 **stop here**. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐

b **10%-facts-and-circumstances test—2023.** 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 **stop here**. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐

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
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 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						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
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						
c Add lines 7a and 7b						
8 **Public support.** (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
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 **Total support.** (Add lines 9, 10c, 11, and 12.)						

14 **First 5 years.** 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 **stop here** ☐

Section C. Computation of Public Support Percentage

15	Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f))	15	%
16	Public support percentage from 2023 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2024** (line 10c, column (f), divided by line 13, column (f))	17	%
18	Investment income percentage from **2023** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests—2024.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b **33 1/3% support tests—2023.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

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
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* ***Part VI*** *how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *how the organization determined that the supported organization was described in section 509(a)(1) or (2).*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer lines 3b and 3c below.*	3a		
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)? *If "Yes," describe in* ***Part VI*** *when and how the organization made the determination.*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* ***Part VI*** *what controls the organization put in place to ensure such use.*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in* ***Part VI*** *how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.*	4b		
c	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)? *If "Yes," explain in* ***Part VI*** *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.*	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in* ***Part VI****, 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).*	5a		
b	**Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	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? *If "Yes," provide detail in* ***Part VI****.*	6		
7	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? *If "Yes," complete Part I of Schedule L (Form 990).*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? *If "Yes," complete Part I of Schedule L (Form 990).*	8		
9a	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))? *If "Yes," provide detail in* ***Part VI****.*	9a		
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? *If "Yes," provide detail in* ***Part VI****.*	9b		
c	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? *If "Yes," provide detail in* ***Part VI****.*	9c		
10a	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)? *If "Yes," answer line 10b below.*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)*	10b		

Part IV Supporting Organizations *(continued)*

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	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?	11a		
b	A family member of a person described on line 11a above?	11b		
c	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* ***Part VI****.*	11c		

Section B. Type I Supporting Organizations

			Yes	No
1	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* ***Part VI*** *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.*	1		
2	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* ***Part VI*** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.*	2		

Section C. Type II Supporting Organizations

			Yes	No
1	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* ***Part VI*** *how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).*	1		

Section D. All Type III Supporting Organizations

			Yes	No
1	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?	1		
2	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* ***Part VI*** *how the organization maintained a close and continuous working relationship with the supported organization(s).*	2		
3	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* ***Part VI*** *the role the organization's supported organizations played in this regard.*	3		

Section E. Type III Functionally Integrated Supporting Organizations

1 *Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (****see instructions****).*

a ☐ The organization satisfied the Activities Test. *Complete* ***line 2*** *below.*

b ☐ The organization is the parent of each of its supported organizations. *Complete* ***line 3*** *below.*

c ☐ The organization supported a governmental entity. *Describe in* ***Part VI*** *how you supported a governmental entity (see instructions).*

			Yes	No
2	Activities Test. ***Answer lines 2a and 2b below.***			
a	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* ***Part VI 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.*	2a		
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* ***Part VI*** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	2b		
3	Parent of Supported Organizations. ***Answer lines 3a and 3b below.***			
a	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* ***Part VI****.*	3a		
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* ***Part VI*** *the role played by the organization in this regard.*	3b		

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.

Section A—Adjusted Net Income			(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	**1**		
2	Recoveries of prior-year distributions	**2**		
3	Other gross income (see instructions)	**3**		
4	Add lines 1 through 3.	**4**		
5	Depreciation and depletion	**5**		
6	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)	**6**		
7	Other expenses (see instructions)	**7**		
8	**Adjusted Net Income** (subtract lines 5, 6, and 7 from line 4)	**8**		

Section B—Minimum Asset Amount			(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a	Average monthly value of securities	**1a**		
b	Average monthly cash balances	**1b**		
c	Fair market value of other non-exempt-use assets	**1c**		
d	**Total** (add lines 1a, 1b, and 1c)	**1d**		
e	**Discount** claimed for blockage or other factors *(explain in detail in* ***Part VI****)*:			
2	Acquisition indebtedness applicable to non-exempt-use assets	**2**		
3	Subtract line 2 from line 1d.	**3**		
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	**4**		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	**5**		
6	Multiply line 5 by 0.035.	**6**		
7	Recoveries of prior-year distributions	**7**		
8	**Minimum Asset Amount** (add line 7 to line 6)	**8**		

Section C—Distributable Amount				Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	**1**		
2	Enter 0.85 of line 1.	**2**		
3	Minimum asset amount for prior year (from Section B, line 8, column A)	**3**		
4	Enter greater of line 2 or line 3.	**4**		
5	Income tax imposed in prior year	**5**		
6	**Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	**6**		

7 ☐ 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)*

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

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

Part VI

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.)

Return Reference - Identifier	Explanation

SCHEDULE A, PART II, LINE 10 - OTHER INCOME

Description	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
(1) INSURANCE LOSS REPAYMENTS	77,385	131,723	24,302	341,751	412,870	988,031
(2) SALE OF PROPERTY	14,000	0	40,986	0	0	54,986
(3) OTHER MISCELLANEOUS INCOME	9,887	26,605	84,693	30,518	45,995	197,698
(4) EQUITY INTEREST IN SUBSIDIARIES	5,123,271	1,681,358	2,570,147	3,716,809	4,988,259	18,079,844
(5) EARNINGS ALLOCATED TO ENDOWMENTS HELD	1,428,048	831,530	973,343	1,145,196	1,148,284	5,526,401
Total	6,652,591	2,671,216	3,693,471	5,234,274	6,595,408	24,846,960

Schedule B (Form 990)
(Rev. January 2025)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Attach to Form 990, 990-EZ, or 990-PF.
Go to *www.irs.gov/Form990* for the latest information.

OMB No. 1545-0047

Name of the organization
NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

Organization type (check one):

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

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

General Rule

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

Special Rules

☑ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (**1**) $5,000; or (**2**) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . . $ _____

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

Name of organization
NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		$ 27,237,599	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

(a) No.	Name, address, and ZIP + 4	Total contributions	(d) Type of contribution
2		$ 13,000,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3		$ 2,710,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

(a) No.	Name, address, and ZIP + 4	Total contributions	(d) Type of contribution
4		$ 2,000,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
5		$ 1,574,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization
NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

Name of organization
NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e) and** the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this information once. See instructions.) $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

SCHEDULE C (Form 990)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under Section 501(c) and Section 527

Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.
Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public Inspection

If the organization answered "Yes" on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then:

- Section 501(c)(3) organizations: Complete Parts I-A and I-B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and I-C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes" on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then:

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes" on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions), or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then:

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization	Employer identification number (EIN)
NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES	53-0210807

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV. See instructions for definition of "political campaign activities."

2 Political campaign activity expenditures. See instructions . . . . . $

3 Volunteer hours for political campaign activities. See instructions . . . . . .

Part I-B Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 . . . . . $

2 Enter the amount of any excise tax incurred by organization managers under section 4955 . . . $

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? . . . . . ☐ Yes ☐ No

4a Was a correction made? . . . . . ☐ Yes ☐ No

b If "Yes," describe in Part IV.

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities . . . . . $

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities . . . . . $

3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b . . . . . $

4 Did the filing organization file **Form 1120-POL** for this year? . . . . . ☐ Yes ☐ No

5 Enter the names, addresses, and EINs of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

	(a) Name	**(b)** Address	**(c)** EIN	**(d)** Amount paid from filing organization's funds. If none, enter -0-.	**(e)** Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					

Part II-A **Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

A Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).

B Check ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals
1a	Total lobbying expenditures to influence public opinion (grassroots lobbying)	32,183	0
b	Total lobbying expenditures to influence a legislative body (direct lobbying)	143,956	0
c	Total lobbying expenditures (add lines 1a and 1b)	176,139	0
d	Other exempt purpose expenditures	91,088,142	0
e	Total exempt purpose expenditures (add lines 1c and 1d)	91,264,281	0
f	Lobbying nontaxable amount. Enter the amount from the following table in both columns.	1,000,000	0
g	Grassroots nontaxable amount (enter 25% of line 1f)	250,000	0
h	Subtract line 1g from line 1a. If zero or less, enter -0-	0	0
i	Subtract line 1f from line 1c. If zero or less, enter -0-	0	0

IF the amount on line 1e, column (a) or (b) is:	THEN the lobbying nontaxable amount is:
not over $500,000	20% of the amount on line 1e.
over $500,000 but not over $1,000,000	$100,000 plus 15% of the excess over $500,000.
over $1,000,000 but not over $1,500,000	$175,000 plus 10% of the excess over $1,000,000.
over $1,500,000 but not over $17,000,000	$225,000 plus 5% of the excess over $1,500,000.
over $17,000,000	$1,000,000.

j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ **Yes** ☐ **No**

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)		(a) 2021	(b) 2022	(c) 2023	(d) 2024	(e) Total
2a	Lobbying nontaxable amount	1,000,000	1,000,000	1,000,000	1,000,000	4,000,000
b	Lobbying ceiling amount (150% of line 2a, column (e))					6,000,000
c	Total lobbying expenditures	248,251	250,077	153,231	176,139	827,698
d	Grassroots nontaxable amount	250,000	250,000	250,000	250,000	1,000,000
e	Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000
f	Grassroots lobbying expenditures	58,239	88,763	18,834	32,183	198,019

Part II-B **Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.		(a) Yes	(a) No	(b) Amount
1	During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a	Volunteers?			
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c	Media advertisements?			
d	Mailings to members, legislators, or the public?			
e	Publications, or published or broadcast statements?			
f	Grants to other organizations for lobbying purposes?			
g	Direct contact with legislators, their staffs, government officials, or a legislative body?			
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
i	Other activities?			
j	Total. Add lines 1c through 1i			
2a	Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?			
b	If "Yes," enter the amount of any tax incurred under section 4912			
c	If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A **Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

			Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1		
2	Did the organization make only in-house lobbying expenditures of $2,000 or less?	2		
3	Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?	3		

Part III-B **Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."**

1	Dues, assessments and similar amounts from members	1	
2	Section 162(e) nondeductible lobbying and political expenditures **(do not include amounts of political expenses for which the section 527(f) tax was paid)**.		
a	Current year	2a	
b	Carryover from last year	2b	
c	Total	2c	
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year?	4	
5	Taxable amount of lobbying and political expenditures. See instructions	5	

Part IV **Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

SCHEDULE D (Form 990)
(Rev. January 2025)

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 TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

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.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	6	1
2	Aggregate value of contributions to (during year)	30,000	0
3	Aggregate value of grants from (during year)	408,954	8,000
4	Aggregate value at end of year	8,767,937	205,586

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☑ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☑ Yes ☐ No

Part II Conservation Easements

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (for example, recreation or education)
☑ Preservation of a historically important land area
☑ Protection of natural habitat
☑ Preservation of a certified historic structure
☑ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

		Held at the End of the Tax Year
a Total number of conservation easements	2a	131
b Total acreage restricted by conservation easements	2b	953.00
c Number of conservation easements on a certified historic structure included on line 2a	2c	110
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register	2d	5

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year 0

4 Number of states where property subject to conservation easement is located 27

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☑ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year 3,938

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year $ 270,910

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☑ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for 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.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenue included on Form 990, Part VIII, line 1 $
(ii) Assets included in Form 990, Part X $

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items.

a Revenue included on Form 990, Part VIII, line 1 $
b Assets included in Form 990, Part X $

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
- b ☑ Scholarly research
- c ☑ Preservation for future generations
- d ☑ Loan or exchange program
- e ☐ Other _____

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
c Beginning balance	1c	
d Additions during the year	1d	
e Distributions during the year	1e	
f Ending balance	1f	

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
1a Beginning of year balance	324,164,947	309,354,526	297,729,719	336,519,087	252,274,995
b Contributions	4,986,537	4,407,853	4,189,950	14,493,119	4,959,759
c Net investment earnings, gains, and losses	31,229,677	27,060,087	20,928,055	(40,512,414)	91,713,667
d Grants or scholarships	1,731,968	1,466,452	1,437,361	1,376,538	1,297,860
e Other expenditures for facilities and programs	16,510,286	12,666,924	8,566,234	8,301,486	8,860,037
f Administrative expenses	2,687,119	2,524,143	3,489,603	3,092,049	2,271,437
g End of year balance	339,451,788	324,164,947	309,354,526	297,729,719	336,519,087

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

- a Board designated or quasi-endowment 31.00 %
- b Permanent endowment 57.00 %
- c Term endowment 12.00 %

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:

		Yes	No
(i) Unrelated organizations?	3a(i)		✔
(ii) Related organizations?	3a(ii)		✔
b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?	3b		

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
1a Land				
b Buildings		7,034,710	2,903,937	4,130,773
c Leasehold improvements		3,272,311	2,525,486	746,825
d Equipment		4,917,694	4,526,994	390,700
e Other				
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, line 10c, column (B))*				5,268,298

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 (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A) INVESTMENT IN SUBSIDIARIES	18,235,235	COST
(B) OTHER NON-PUBLIC INVESTMENTS	331,195,552	END OF YEAR MARKET VALUE
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, line 12, col. (B))*	349,430,787	

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: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. *(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)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, line 15, col. (B))*	

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) MONTPELIER FOUNDATION ENDOWMENT	9,656,439
(3) LEASE LIABILITY	8,486,213
(4) ENDOWMENT FOR CONGRESSIONAL CEMETERY	6,093,648
(5) BELLE GROVE ENDOWMENT	3,752,599
(6) GIFT ANNUITIES	1,589,823
(7) OTHER LIABILITIES	1,313,163
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, line 25, col. (B))*	30,891,885

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.

1	Total revenue, gains, and other support per audited financial statements			1	123,541,552
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a	17,285,531		
b	Donated services and use of facilities	2b	1,457,676		
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d	718,513		
e	Add lines **2a** through **2d**			2e	19,461,720
3	Subtract line **2e** from line **1**			3	104,079,832
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	795,999		
b	Other (Describe in Part XIII.)	4b	0		
c	Add lines **4a** and **4b**			4c	795,999
5	Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)*			5	104,875,831

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.

1	Total expenses and losses per audited financial statements			1	92,644,472
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a	1,457,676		
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d	718,513		
e	Add lines **2a** through **2d**			2e	2,176,189
3	Subtract line **2e** from line **1**			3	90,468,283
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	795,999		
b	Other (Describe in Part XIII.)	4b	0		
c	Add lines **4a** and **4b**			4c	795,999
5	Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)*			5	91,264,282

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.

SEE STATEMENT

Part XIII

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.

Return Reference - Identifier	Explanation
SCHEDULE D, PART XI, LINE 2(D) - OTHER REVENUES IN AUDITED FINANCIAL STATEMENTS NOT IN FORM 990	

(a) Description	**(b)** Amount
COST OF GOODS SOLD	385,957
FUNDRAISING EXPENSE	332,556
TOTAL	**718,513**

Return Reference - Identifier	Explanation
SCHEDULE D, PART XII, LINE 2(D) - OTHER EXPENSES IN AUDITED FINANCIAL STATEMENTS NOT IN FORM 990	

(a) Description	**(b)** Amount
COST OF GOODS SOLD	385,958
FUNDRAISING EXPENSE	332,555
TOTAL	**718,513**

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.

Return Reference - Identifier	Explanation
SCHEDULE D, PART II, LINE 4	NUMBER OF STATES WHERE PROPERTIES SUBJECT TO CONSERVATION EASEMENTS ARE LOCATED WAS 26 PLUS THE DISTRICT OF COLUMBIA FOR A TOTAL OF 27.
SCHEDULE D, PART II, LINE 5 - CONSERVATION EASEMENTS POLICY	THE NATIONAL TRUST'S BOARD-ESTABLISHED EASEMENT POLICY SETS OUT GENERAL STANDARDS FOR ACQUISITION, INSPECTION, AND ENFORCEMENT. THESE POLICIES ARE REFLECTED IN EASEMENT DEEDS, AUTHORIZING INSPECTION RIGHTS AND FULL ENFORCEMENT POWERS. THE NATIONAL TRUST ALSO HAS STANDARD OPERATING PROCEDURES TO PROVIDE GUIDANCE TO THE ORGANIZATION'S STAFF ON THE PROCEDURES FOR ADMINISTERING ITS EASEMENT PROGRAM. THE NATIONAL TRUST PHYSICALLY INSPECTS ITS EASEMENTS ON A REGULAR BASIS. IN ADDITION TO PHYSICAL MONITORING, THE NATIONAL TRUST ALSO MONITORS PROPERTIES THROUGH THE PROVISION OF TECHNICAL ADVICE TO PROPERTY OWNERS RELATED TO THE CARE AND MAINTENANCE OF THEIR PROPERTY. ALSO, THE NATIONAL TRUST, USING THE SECRETARY OF THE INTERIOR'S STANDARDS FOR THE TREATMENT OF HISTORIC PROPERTIES, REVIEWS THE EXISTING CONDITION OF A PROPERTY WHENEVER IT RECEIVES A REQUEST TO MAKE A CHANGE OR ALTERATION FROM A PROPERTY OWNER. THE NATIONAL TRUST ENFORCES RESTRICTIONS IN EASEMENTS, INCLUDING THROUGH LEGAL ACTION WHEN NECESSARY.
SCHEDULE D, PART II, LINE 9 - CONSERVATION EASEMENTS FINANCIAL REPORTING	EXPENSES RELATING TO THE ADMINISTRATION OF THE NATIONAL TRUST'S EASEMENT PROGRAM ARE INCLUDED AS PROGRAM-RELATED EXPENSES ON THE STATEMENT OF FUNCTIONAL EXPENSES. THE VALUE OF EASEMENTS IS NOT INCLUDED ON THE STATEMENT OF FINANCIAL POSITION.
SCHEDULE D, PART III, LINE 1A - COLLECTIONS OF ART - FINANCIAL STATEMENT FOOTNOTE	THE TRUST'S MUSEUM COLLECTION INCLUDES HISTORIC SITES, STRUCTURES, LANDSCAPES, AND OBJECTS THAT ARE AVAILABLE TO THE PUBLIC OR HELD FOR THAT PURPOSE. IT ACQUIRES ITS COLLECTION BY PURCHASE OR BY DONATION. THE TRUST'S COLLECTIONS MANAGEMENT POLICY INCLUDES GUIDANCE ON THE DOCUMENTATION, PRESERVATION, CARE, AND MANAGEMENT OF THE COLLECTIONS AND PROCEDURES RELATED TO THE ACCESSION AND DEACCESSION OF COLLECTION ITEMS. IN CONFORMITY WITH THE PRACTICE GENERALLY FOLLOWED BY MUSEUMS, NO VALUE IS ASSIGNED TO THE COLLECTIONS IN THE CONSOLIDATED STATEMENTS OF FINANCIAL POSITION. THE HISTORIC SITES, INCLUDING OBJECTS AND FURNISHINGS, OWNED BY THE TRUST WITH THE INTENT OF RETENTION ARE NOT REPORTED IN THE ACCOMPANYING CONSOLIDATED STATEMENTS OF FINANCIAL POSITION. PURCHASES OF COLLECTION ITEMS ARE RECOGNIZED AS REDUCTIONS IN UNRESTRICTED NET ASSETS WITHOUT DONOR RESTRICTIONS IN THE PERIOD OF ACQUISITION. PER THE TRUST'S COLLECTIONS MANAGEMENT POLICY AND FOLLOWING PROFESSIONAL STANDARDS AND GUIDELINES, PROCEEDS FROM DEACCESSIONS OF COLLECTION ITEMS ARE DESIGNATED FOR THE REPLENISHMENT OR CARE OF OTHER OBJECTS WITHIN THE MUSEUM COLLECTION AND THE PRESERVATION OF HISTORIC STRUCTURES OR HISTORIC LANDSCAPE FEATURES THAT ARE PART OF THE HISTORIC STRUCTURES AND LANDSCAPES COLLECTION. EXPENDITURES FOR RESTORATION, STABILIZATION, RECONSTRUCTION, AND DEVELOPMENT ARE CHARGED TO EXPENSE AS INCURRED.
SCHEDULE D, PART III, LINE 4 - COLLECTIONS OF ART - DESCRIPTION OF COLLECTIONS	THE NATIONAL TRUST OWNS CERTAIN HISTORIC SITES THAT ARE OPERATED AS MUSEUMS OR ARE OTHERWISE INTEGRAL TO THE TRUST'S CHARITABLE AND EDUCATIONAL PRESERVATION PROGRAM. THESE HISTORIC SITES, MOST OF WHICH CONTAIN SIGNIFICANT COLLECTIONS OF FURNISHINGS, ARE REGULARLY OPEN TO THE PUBLIC.
SCHEDULE D, PART V, LINE 4 - INTENDED USES OF ENDOWMENT FUNDS	THE NATIONAL TRUST'S ENDOWMENT FUNDS ARE USED TO SUPPORT THE COSTS OF MAINTAINING ITS HISTORIC SITES, FOR GRANTS TO PRESERVATION ORGANIZATIONS AND SIMILAR PURPOSES, AND TO SUPPORT NATIONAL TRUST'S CHARITABLE AND EDUCATIONAL PROGRAMS AND ACTIVITIES.
SCHEDULE D, PART X, LINE 2 - FIN 48 (ASC 740) FOOTNOTE	THE TRUST ACCOUNTS FOR UNCERTAIN TAX POSITIONS IN ACCORDANCE WITH FASB ACCOUNTING STANDARDS CODIFICATION (ASC) 740, INCOME TAXES (ASC 740), WHICH REQUIRES THAT A TAX POSITION BE RECOGNIZED OR DERECOGNIZED BASED ON A "MORE LIKELY THAN NOT" THRESHOLD. THIS APPLIES TO POSITIONS TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN. THE TRUST DOES NOT BELIEVE ITS FINANCIAL STATEMENTS INCLUDE ANY MATERIAL UNCERTAIN TAX POSITIONS. THE TRUST IS STILL OPEN TO EXAMINATION BY TAXING AUTHORITIES FROM FISCAL YEAR ENDED JUNE 30, 2022 FORWARD. THE NATIONAL TRUST IS A SECTION 501(C)(3) ORGANIZATION EXEMPT FROM INCOME TAX AS PROVIDED UNDER SECTION 501(A) OF THE INTERNAL REVENUE CODE. UNRELATED BUSINESS TAXABLE INCOME IS SUBJECT TO INCOME TAX.

SCHEDULE F (Form 990)
(Rev. January 2025)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.
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 TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

Part I **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

1 **For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . ☐ **Yes** ☐ **No**

2 **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

3 Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

	(a) Region	**(b)** Number of offices in the region	**(c)** Number of employees, agents, and independent contractors in the region	**(d)** Activities conducted in the region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	**(e)** If activity listed in (d) is a program service, describe specific type of service(s) in the region	**(f)** Total expenditures for and investments in the region
(1)	CENTRAL AMERICA AND THE CARIBBEAN	0	0	INVESTMENTS		131,030,815
(2)	EUROPE (INCLUDING ICELAND AND GREENLAND)	0	0	INVESTMENTS		15,983,703
(3)						
(4)						
(5)						
(6)						
(7)						
(8)						
(9)						
(10)						
(11)						
(12)						
(13)						
(14)						
(15)						
(16)						
(17)						
3a	Subtotal	0	0			147,014,518
b	Total from continuation sheets to Part I	0	0			0
c	**Totals** (add lines 3a and 3b)	0	0			147,014,518

Part II **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than $5,000. Part II can be duplicated if additional space is needed.

1	(a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of noncash assistance	(h) Description of noncash assistance	(i) Method of valuation (book, FMV, appraisal, other)
(1)									
(2)									
(3)									
(4)									
(5)									
(6)									
(7)									
(8)									
(9)									
(10)									
(11)									
(12)									
(13)									
(14)									
(15)									
(16)									

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as a tax exempt 501(c)(3) organization by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter . . . . .

3 Enter total number of other organizations or entities . . . . . .

Part III **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed.

	(a) Type of grant or assistance	**(b)** Region	**(c)** Number of recipients	**(d)** Amount of cash grant	**(e)** Manner of cash disbursement	**(f)** Amount of noncash assistance	**(g)** Description of noncash assistance	**(h)** Method of valuation (book, FMV, appraisal, other)
(1)								
(2)								
(3)								
(4)								
(5)								
(6)								
(7)								
(8)								
(9)								
(10)								
(11)								
(12)								
(13)								
(14)								
(15)								
(16)								
(17)								
(18)								

Part IV Foreign Forms

1	Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)*	☑ Yes	☐ No
2	Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)*	☐ Yes	☑ No
3	Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see Instructions for Form 5471)*	☑ Yes	☐ No
4	Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see Instructions for Form 8621)*	☑ Yes	☐ No
5	Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see Instructions for Form 8865)*	☑ Yes	☐ No
6	Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990)*	☐ Yes	☑ No

Part V Supplemental Information

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

Return Reference - Identifier	Explanation
SCHEDULE F, PART I, LINE 3 - METHOD USED TO ACCOUNT FOR EXPENDITURES ON ORG'S FINANCIAL STATEMENTS	CENTRAL AMERICA AND THE CARIBBEAN - OTHER EUROPE (INCLUDING ICELAND AND GREENLAND) - OTHER

SCHEDULE G (Form 990)
(Rev. January 2025)
Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.
Attach to Form 990 or Form 990-EZ.
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 TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

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? ☑ **Yes** ☐ **No**

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.

	(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions? Yes	(iii) No	(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
1	AVALON CONSULTING GROUP, 1011 BAY RIDGE AVE, UNIT 323, ANNAPOLIS, MD 21403	DIGITAL MARKETING		✔	0	446,004	(446,004)
2	EIDOLON COMMUNICATIONS, INC., 247 MUNICIPAL RD, ERWINNA, PA 18920	DIRECT MARKETING		✔	0	222,000	(222,000)
3							
4							
5							
6							
7							
8							
9							
10							
Total					0	668,004	(668,004)

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.

AL, AK, AZ, AR, CA, CO, CT, DE, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

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 GLASS HOUSE (event type)	(b) Event #2 WILSON HOUSE (event type)	(c) Other events 4 (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts	496,712	158,274	184,891	839,877
	2 Less: Contributions	245,250	128,885	97,825	471,960
	3 Gross income (line 1 minus line 2)	251,462	29,389	87,066	367,917
Direct Expenses	4 Cash prizes				0
	5 Noncash prizes				0
	6 Rent/facility costs				0
	7 Food and beverages				0
	8 Entertainment				0
	9 Other direct expenses	190,911	70,765	70,879	332,555
	10 Direct expense summary. Add lines 4 through 9 in column (d)				332,555
	11 Net income summary. Subtract line 10 from line 3, column (d)				35,362

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 bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d)				
	8 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: _____

11 Does the organization conduct gaming activities with nonmembers? . . . . . ☐ Yes ☐ No

12 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? . . . . . ☐ Yes ☐ No

13 Indicate the percentage of gaming activity conducted in:

a	The organization's facility	**13a**	%
b	An outside facility	**13b**	%

14 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 name and address of the third party:

Name _____

Address _____

16 Gaming manager information:

Name _____

Gaming manager compensation $ _____

Description of services provided _____

☐ 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.

SCHEDULE I (Form 990)

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

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 TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number

53-0210807

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? . . . . . ☑ **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.

1 **(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
(1) NT GREEN FUND, INC. 600 14TH ST, NW #500, WASHINGTON, DC 20005	99-4302051	501(C)(3)	1,700,000				HISTORIC PRESERVATION
(2) ST JAMES AME CHURCH 419 S 8TH STREET, MAYFIELD, KY 42066	62-1421651	501(C)(3)	1,413,451				HISTORIC PRESERVATION
(3) HISTORIC BROWN CHAPEL AME 117 LANDLINE ROAD, SELMA, AL 36701	27-0790354	501(C)(3)	1,020,000				HISTORIC PRESERVATION
(4) ROBERTS TEMPLE CHURCH OF GOD IN CHRIST 4021 S STATE STREET, CHICAGO, IL 60609	36-6145500	501(C)(3)	1,000,000				HISTORIC PRESERVATION
(5) MONTPELIER FDN. P.O. BOX 67 13384 LDRY RD., MPR STN., VA 22957	31-1620682	501(C)(3)	551,588				HISTORIC PRESERVATION
(6) GLIDE FOUNDATION 330 ELLIS STREET, SAN FRANCISCO, CA 94102	94-1156481	501(C)(3)	500,000				HISTORIC PRESERVATION
(7) ANTIOCH BAPTIST CHURCH 1057 TEXAS AVENUE, SHREVEPORT, LA 71101	72-0797968	501(C)(3)	500,000				HISTORIC PRESERVATION
(8) FIRST CONG. CHURCH OF MARION (UCC) 535 CLAY ST., MARION, AL 36756	82-3083560	501(C)(3)	500,000				HISTORIC PRESERVATION
(9) MT CARMEL MISSIONARY BAPTIST 1717 W MEINECKE AV, MILWAUKEE, WI 53206	39-1671969	501(C)(3)	500,000				HISTORIC PRESERVATION
(10) NEW BETHEL BAPTIST CHURCH 8430 C L FRANKLIN BLVD, DETROIT, MI 48206	38-1724101	501(C)(3)	500,000				HISTORIC PRESERVATION
(11) QUINN CHAPEL AME FREDERICK 106 E 3RD STREET, FREDERICK, MD 21701	52-1434622	501(C)(3)	500,000				HISTORIC PRESERVATION
(12) (SEE STATEMENT)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 190

3 Enter total number of other organizations listed in the line 1 table 19

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	ROUTE 66	6	70,000			
2						
3						
4						
5						
6						
7						

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

(SEE STATEMENT)

Part II **Grants and Other Assistance to Governments and Organizations in the United States** (continued)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(12) ST ALPHONSUS LIGUORI 1118 N GRAND BLVD, ST LOUIS, MO 63106	43-0653430	501(C)(3)	499,999				HISTORIC PRESERVATION
(13) BOYNTON CHAPEL METHODIST 2812 MILLBY STREET, HOUSTON, TX 77004	76-0094310	501(C)(3)	475,000				HISTORIC PRESERVATION
(14) DICKERSON CHAPEL AME CHURCH 100 E. QUEEN STREET, HILLSBOROUGH, NC 27278	82-2393631	501(C)(3)	400,000				HISTORIC PRESERVATION
(15) SIXTEENTH STREET BAPTIST CHURCH 1530 6TH AVENUE, NORTH, BIRMINGHAM, AL 35203	63-0397962	501(C)(3)	300,000				HISTORIC PRESERVATION
(16) CLEVELAND RESTORATION SOC 3751 PROSPECT AVENUE, CLEVELAND, OH 44115	23-7218767	501(C)(3)	300,000				HISTORIC PRESERVATION
(17) ASSOCIATION FOR THE PRESERVATION OF THE CONGRESSIONAL CEMETERY 1801 E ST SE, WASHINGTON, DC 20003	52-1071828	501(C)(3)	289,961				HISTORIC PRESERVATION
(18) SAINT ADALBERT CATHOLIC CHURCH 2505 GRACE STREET, SOUTH BEND, IN 46619	35-1095958	501(C)(3)	250,000				HISTORIC PRESERVATION
(19) SOAPSTONE PRESERVATION P.O. BOX 454, MARIETTA, SC 29661	92-0309884	501(C)(3)	250,000				HISTORIC PRESERVATION
(20) FAMICOS FOUNDATION 1325 ANSEL ROAD, CLEVELAND, OH 44106	34-1053534	501(C)(3)	250,000				HISTORIC PRESERVATION
(21) FRIENDS OF ZOAR, INC. P.O. BOX 295, ODESSA, DE 19730	86-2503985	501(C)(3)	250,000				HISTORIC PRESERVATION
(22) WILSON COUNTY BLACK HISTORY COMMITTEE P.O. BOX 391, LEBANON, TN 37088	02-0693999	501(C)(3)	250,000				HISTORIC PRESERVATION
(23) IBERIA AFRICAN AMERICAN HIST SOC P.O. BOX 9923, NEW IBERIA, LA 70562	82-3318938	501(C)(3)	220,000				HISTORIC PRESERVATION
(24) BLUE GRASS COMM FNDT, INC. 499 E HIGH STREET 112, LEXINGTON, KY 40507	61-6053466	501(C)(3)	200,000				HISTORIC PRESERVATION
(25) BURKS CHAPEL AME CHURCH 635 OHIO STREET, PADUCAH, KY 42003	61-1136913	501(C)(3)	200,000				HISTORIC PRESERVATION
(26) BETHEL AFRICAN METHODIST EPISCOPAL CHURCH 450-512 EAST STRAWBERRY STREET, LANCASTER, PA 17602	23-2526533	501(C)(3)	200,000				HISTORIC PRESERVATION
(27) NEW HAVEN PRESERVATION 810 MAUPIN AVENUE, NEW HAVEN, MO 63068	43-1793318	501(C)(3)	200,000				HISTORIC PRESERVATION
(28) PRESERVATION ALLIANCE OF WEST VIRGINIA, INC. 421 DAVIS AVENUE #4, ELKINS, WV 26241	31-1028713	501(C)(3)	200,000				HISTORIC PRESERVATION
(29) PRESERVATION SOUTH CAROLINA 1109 BROAD STREET, SUITE 2H, CAMDEN , SC 29020	57-0913191	501(C)(3)	200,000				HISTORIC PRESERVATION

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(30) WEST HUNTER STREET BAPTIST CHURCH 1040 RALPH DAVID ABERNATHY BLVD, SW, ATLANTA, GA 30310	58-0666901	501(C)(3)	200,000				HISTORIC PRESERVATION
(31) SECOND BAPTIST CHURCH (CA) 2412 GRIFFITH AVENUE, LOS ANGELES, CA 90011	95-6002905	501(C)(3)	173,442				HISTORIC PRESERVATION
(32) TALLADEGA COLLEGE 627 WEST BATTLE STREET, TALLADEGA, AL 35169	63-0288870	501(C)(3)	155,000				HISTORIC PRESERVATION
(33) DREAM CENTER GOLDEN TRIANGLE 5771 HWY 45 ALT SOUTH, WEST POINT, MS 39773	83-3343694	501(C)(3)	150,000				HISTORIC PRESERVATION
(34) MARTIN HOUSE RESTORATION CORP 143 JEWETT PARKWAY, BUFFLAO, NY 14214	16-1426693	501(C)(3)	150,000				HISTORIC PRESERVATION
(35) NEW AMSTERDAM MUSICAL ASSN 107 W 130TH STREET, NEW YORK, NY 10027	52-2333917	501(C)(3)	150,000				HISTORIC PRESERVATION
(36) PRESERVATION BUFFALO NIAGARA 617 MAIN STREET, STE 201, BUFFALO, NY 14203	22-2986810	501(C)(3)	150,000				HISTORIC PRESERVATION
(37) SOUTH MEMPHIS RENEWAL COMM DEV 1109 MISSISSIPPI BLVD, MEMPHIS, TN 38126	46-0468961	501(C)(3)	150,000				HISTORIC PRESERVATION
(38) THE LIGHTHOUSE BLACK GIRL PROJECT P.O. BOX 607, JACKSON, MS 39205	82-2064693	501(C)(3)	150,000				HISTORIC PRESERVATION
(39) BASILLCA ST MARY IMMACULATE P.O. BOX 2100, NORFOLK, VA 23501	33-1683453	501(C)(3)	150,000				HISTORIC PRESERVATION
(40) CITY OF CARSON 701 E CARSON STREET, CARSON, CA 90745	95-2513547	GOVERNMENT	150,000				HISTORIC PRESERVATION
(41) MASJID MUHAMMAD, INC. 1519 4TH STREET NW, WASHINGTON, DC 20001	94-3135848	501(C)(3)	150,000				HISTORIC PRESERVATION
(42) MOREHOUSE COLLEGE 830 WESTVIEW DR SW, ATLANTA, GA 30314	58-0566205	501(C)(3)	150,000				HISTORIC PRESERVATION
(43) MORGAN STATE UNIVERSITY 1700 EAST COLD SPRING LANE, BALTIMORE, MD 21251	52-6002033	501(C)(3)	150,000				HISTORIC PRESERVATION
(44) VIRGINIA STATE UNIVERSITY ALUMNI ASSOCIATION P.O. BOX 2488, PETERSBURG, VA 23804	54-1805790	501(C)(3)	150,000				HISTORIC PRESERVATION
(45) HOWARD UNIVERSITY, INC. 2400 SIXTH STREET NW, WASHINGTON, DC 20059	53-0204707	501(C)(3)	150,000				HISTORIC PRESERVATION
(46) CLIVEDEN, INC. 6401 GERMANTOWN AVENUE, PHILADELPHIA, PA 19144	23-2232675	501(C)(3)	141,580				HISTORIC PRESERVATION

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(47) KENNARD ALUMNI ASSOC 410 LITTLE KIDWELL AVENUE, CENTREVILLE, MD 21617	30-0137016	501(C)(3)	140,000				HISTORIC PRESERVATION
(48) CHURCH OF THE HOLY APOSTLES 296 NINTH AVENUE, NEW YORK, NY 10001	13-2892297	501(C)(3)	125,000				HISTORIC PRESERVATION
(49) UNITARIAN UNIVERSALIST CHURCH OF BUFFALO 695 ELMWOOD AVENUE, BUFFALO, NY 14222	16-0778801	501(C)(3)	125,000				HISTORIC PRESERVATION
(50) OLD SHIP AME ZION CHURCH 483 HOLCOMBE STREET, MONTGOMERY, AL 36104	63-0988510	501(C)(3)	125,000				HISTORIC PRESERVATION
(51) DEXTER AVE KING MBC 455 WASHINGTON AVENUE, MONTGOMERY, AL 36104	63-0340856	501(C)(3)	125,000				HISTORIC PRESERVATION
(52) OLD SARDIS REVITALIZATION CDC 1240 4TH ST N, BIRMINGHAM, AL 35204	46-1532435	501(C)(3)	125,000				HISTORIC PRESERVATION
(53) THE AUTHENTIC HISTORIC BROWN AME 410 MARTIN LUTHER KING JR STREET, SELMA, AL 36703	86-2580705	501(C)(3)	125,000				HISTORIC PRESERVATION
(54) EAST MOUNT ZION BAPTIST CHURCH 9990 EUCLID AVENUE, CLEVELAND , OH 44106	34-1432055	501(C)(3)	112,500				HISTORIC PRESERVATION
(55) IVY HERITAGE FOUNDATION P.O. BOX 452658, LOS ANGELES, CA 90045	54-1112932	501(C)(3)	100,000				HISTORIC PRESERVATION
(56) JACK HADLEY BLACK HISTORY MEMORABILIA 214 ALEXANDER STREET, THOMASVILLE, GA 31792	58-2125202	501(C)(3)	100,000				HISTORIC PRESERVATION
(57) NICODEMUS HISTORICAL SOCIETY 611 SOUTH 5TH STREET, NICODEMUS, KS 67625	93-1012167	501(C)(3)	100,000				HISTORIC PRESERVATION
(58) RUTHERFORD YATES MUSEUM P.O. BOX 130726, HOUSTON, TX 77219	76-0536349	501(C)(3)	100,000				HISTORIC PRESERVATION
(59) THE FRIENDS OF HUBBARD HOUSE 942 MCFERRIN AVENUE, NASHVILLE, TN 37206	46-2928109	501(C)(3)	100,000				HISTORIC PRESERVATION
(60) CITY OF BOISE CITY 150 N CAPITOL BLVD, BOISE, ID 83702	82-6000165	GOVERNMENT	100,000				HISTORIC PRESERVATION
(61) AME ZION CHURCH OF KINGSTON 26 FRANKLIN STREET, KINGSTON, NY 12401	33-3894843	501(C)(3)	100,000				HISTORIC PRESERVATION
(62) CAMPBELL AFRICAN METHODIST 33 W THIRD STREET, MEDIA, PA 19063	27-1146827	501(C)(3)	100,000				HISTORIC PRESERVATION
(63) DABNEY HILL MISSIONARY BAPTIST CHURCH P.O. BOX 408, SNOOK, TX 77878	93-3177533	501(C)(3)	100,000				HISTORIC PRESERVATION
(64) ST PAUL UNITED METHODIST 1500 6TH AVENUE NORTH, BIRMINGHAM, AL 36203	63-0873517	501(C)(3)	100,000				HISTORIC PRESERVATION

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(65) THE HISTORIC BETHEL BAPTIST 3200 28TH AVE N, BIRMINGHAM, AL 35207	63-1271978	501(C)(3)	100,000				HISTORIC PRESERVATION
(66) HISTORIC CHARLESTON FNDTN P.O. BOX 1120, CHARLESTON, SC 29402	57-6000599	501(C)(3)	100,000				HISTORIC PRESERVATION
(67) DOUGLAS COUNTY HISTORICAL 1047 MASSACHUSETTS STREET, LAWRENCE, KS 66044	48-0777475	501(C)(3)	100,000				HISTORIC PRESERVATION
(68) SAINT JOHN AFRICAN METHODIST EPISCOPAL CHURCH 210 CLINTON STREET, FRANKFORT, KY 40601	61-1175176	501(C)(3)	100,000				HISTORIC PRESERVATION
(69) PARTNERS FOR SACRED PLACES, INC. 1700 SANSOM STREET, PHILADELPHIA, PA 19103	23-2560361	501(C)(3)	89,250				HISTORIC PRESERVATION
(70) KAM ISAIAH ISRAEL 5039 GREENWOOD AVENUE, CHICAGO, IL 60615	36-2192822	501(C)(3)	87,500				HISTORIC PRESERVATION
(71) NEW LIFE AT CALVARY 2020 EAST 79TH STREET, CLEVELAND, OH 44103	45-3539663	501(C)(3)	87,500				HISTORIC PRESERVATION
(72) ARCH STREET MEETING HOUSE 320 ARCH STREET, PHILADELPHIA, PA 19106	45-4125404	501(C)(3)	75,000				HISTORIC PRESERVATION
(73) ST. RITA CATHOLIC CHURCH 1733 DR. ANDREW J. BROWN AVENUE, INDIANAPOLIS, IN 46202	35-0869038	501(C)(3)	75,000				HISTORIC PRESERVATION
(74) NC DEPARTMENT OF NATURAL 109 E JONES STREET, RALEIGH, NC 27601	56-6062189	GOVERNMENT	75,000				HISTORIC PRESERVATION
(75) BRAINERD INSTITUE HERITAGE 761 LANCASTER HWY, CHESTER, SC 29706	81-4103738	501(C)(3)	75,000				HISTORIC PRESERVATION
(76) PHYLLIS WHEATLEY COMM CENTER 1301 N. 10TH AVENUE, MINNEAPOLIS, MN 55411	41-0706132	501(C)(3)	75,000				HISTORIC PRESERVATION
(77) PRESERVE SHADY REST COMMITTEE P.O. BOX 392, SCOTCH PLAINS, NJ 07076	46-3897718	501(C)(3)	75,000				HISTORIC PRESERVATION
(78) PROSPECT PARK ALLIANCE, INC. 95 PROPSECT PARK WEST, BROOKLYN, NY 11215	11-2843763	501(C)(3)	75,000				HISTORIC PRESERVATION
(79) FIRST AFRICAN METHODIST EPISCOPAL CHURCH OF ATHENS, INC. 521 N HULL STREET, ATHENS, GA 30601	88-3182735	501(C)(3)	75,000				HISTORIC PRESERVATION
(80) TOWN OF EATONVILLE 11 PEOPLE STREET, EATONVILLE, FL 32751	59-1023080	GOVERNMENT	75,000				HISTORIC PRESERVATION
(81) ST. PAUL'S CHURCH MARQUETTE 201 EAST RIDGE STREET, MARQUETTE, MI 49855	38-1399008	501(C)(3)	67,500				HISTORIC PRESERVATION
(82) HAMPTON UNIVERSITY 200 WILLIAM R. HARVEY WAY, HAMPTON, VA 23668	54-0505990	501(C)(3)	65,000				HISTORIC PRESERVATION

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(83) ARCH STREET UNITED METHODIST CHURCH 55 NORTH BROAD STREET, PHILADELPHIA, PA 19107	23-1433905	501(C)(3)	62,500				HISTORIC PRESERVATION
(84) HAMILTON HOOD FOUNDATION, INC. 1455 PENN. AVE. NW, STE 400, WASHINGTON, DC 20004	85-1929447	501(C)(3)	60,000				HISTORIC PRESERVATION
(85) STRAWBERRY MANSION COMM DEV 2829 WEST DIAMOND STREET, PHILADELPHIA, PA 19121	06-1734513	501(C)(3)	60,000				HISTORIC PRESERVATION
(86) MUSEUM AFRICAN AMERICAN HIST 31 MILK STREET, SUITE 705, BOSTON, MA 02109	04-2429556	501(C)(3)	59,982				HISTORIC PRESERVATION
(87) CROSSNORE PRESBYTERIAN CHURCH 200 CHAPEL DRIVE, CROSSNORE, NC 28616	56-1362851	501(C)(3)	50,000				HISTORIC PRESERVATION
(88) FIRST INDIAN PRESBYTERIAN CHURCH P.O. BOX 1, KAMIAH, ID 83536	93-2103198	501(C)(3)	50,000				HISTORIC PRESERVATION
(89) GRACE EPISCOPAL CHURCH 76 ELDREDGE STREET, NEWTON CORNER, MA 02458	04-2104262	501(C)(3)	50,000				HISTORIC PRESERVATION
(90) ST STEPHEN UNITED METHODIST CHURCH 2520 OATES DRIVE, MESQUITE, TX 75150	75-6005365	501(C)(3)	50,000				HISTORIC PRESERVATION
(91) VANG LUTHERAN CHURCH VANG LUTHERAN CHURCH, DENNISON, MN 55018	41-1998150	501(C)(3)	50,000				HISTORIC PRESERVATION
(92) WESLEY A.M.E. ZION CHURCH 1500 LOMBARD STREET, PHILADELPHIA, PA 19146	23-2955428	501(C)(3)	50,000				HISTORIC PRESERVATION
(93) AMMD PINE GROVE PROJECT 2819 SKLETON STREET, RICHMOND, VA 23223	85-1377067	501(C)(3)	50,000				HISTORIC PRESERVATION
(94) BRANDYWINE VAL SCENIC BYWAY COMM 268 KENNETT PIKE, CHADDS FORD, PA 19317	13-4337518	501(C)(3)	50,000				HISTORIC PRESERVATION
(95) CINCINNATI PRESERVATION 812 DAYTON STREET, CINCINNATI, OH 45214	31-6049618	501(C)(3)	50,000				HISTORIC PRESERVATION
(96) MT ZION MEMORIAL FUND 22 COUNTY ROAD 422, WATER VALLEY, MS 38965	86-3749958	501(C)(3)	50,000				HISTORIC PRESERVATION
(97) OLMSTED PARKS CONSERVANCY, INC. 1299 TREVILIAN WAY, LOUISVILLE, KY 40213	61-1196368	501(C)(3)	50,000				HISTORIC PRESERVATION
(98) THE RENAISSANCE COLLABORATIVE 3757 S. WABASH AVENUE, CHICAGO, IL 60653	36-3843379	501(C)(3)	50,000				HISTORIC PRESERVATION
(99) WOODLAWN CONSERVANCY 4199 WEBSTER AVENUE, BRONX, NY 10470	31-1695037	501(C)(3)	50,000				HISTORIC PRESERVATION

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(100) GAITHERSBURG PARKS, ARTS & REC 31 S SUMMIT AVENUE, GAITHERSBURG, MD 20877	76-0770460	501(C)(3)	50,000				HISTORIC PRESERVATION
(101) PRESIDENT LINCOLN'S COTTAGE AT THE SOLDIERS' HOME 3700 N. CAPITOL ST. NW, WASHINGTON, DC 20011	47-1453864	501(C)(3)	48,600				HISTORIC PRESERVATION
(102) FIRST PRESBYTERIAN CHURCH OF TAOS 215 PASEO DEL PUEBLO NORTE, TAOS, NM 87571	85-0204766	501(C)(3)	46,250				HISTORIC PRESERVATION
(103) TABERNACLE BAPTIST CHURCH P.O. BOX 1564, BEAUFORT, SC 29901	25-3828737	501(C)(3)	43,750				HISTORIC PRESERVATION
(104) CITY OF FLAGSTAFF 211 W. ASPEN AVENUE, FLAGSTAFF, AZ 86001	86-6000244	GOVERNMENT	40,350				ROUTE 66
(105) UNIVERSITY OF PENNSYLVANIA 3451 WALNUT STREET, PHILADELPHIA, PA 19104	23-1352685	501(C)(3)	37,500				HISTORIC PRESERVATION
(106) AMANA CHURCH SOCIETY P.O. BOX 103, MIDDLE AMANA, IA 52307	42-6069150	501(C)(3)	35,000				HISTORIC PRESERVATION
(107) BRUCEMORE, INC. 2160 LINDEN DR SE, CEDAR RAPIDS, IA 52403	42-1170531	501(C)(3)	33,757				HISTORIC PRESERVATION
(108) DRAYTON HALL PRESERVATION TRUST 3380 ASHLEY RIVER ROAD, CHARLESTON, SC 29414	45-4938941	501(C)(3)	32,798				HISTORIC PRESERVATION
(109) HISTORIC PRESERVATION ALLIANCE OF ARKANSAS DBA PRESERVE ARKANSAS P.O. BOX 305, LITTLE ROCK , AR 72203	71-0569359	501(C)(3)	30,000				HISTORIC PRESERVATION
(110) DOVER FRIENDS MEETING (QUAKER) 141 CENTRAL AVENUE, DOVER, NH 03820	02-6008834	501(C)(3)	25,000				HISTORIC PRESERVATION
(111) FRIENDS OF EASTERN NECK, INC. P.O. BOX 450, ROCK HALL, MD 21661	52-2049646	501(C)(3)	25,000				HISTORIC PRESERVATION
(112) THE CONVENTION OF THE PROTESTANT EPISCOPAL CHURCH IN THE DIOCESE OF EASTON 314 NORTH STREET, EASTON, MD 21601	52-6015614	501(C)(3)	25,000				HISTORIC PRESERVATION
(113) WASHINGTON COLLEGE 300 WASHINGTON AVENUE, CHESTERTOWN, MD 21620	52-0591691	501(C)(3)	25,000				HISTORIC PRESERVATION
(114) ASTRODOME CONSERVANCY 2726 BISSONNET, HOUSTON, TX 77005	81-3660137	501(C)(3)	20,000				HISTORIC PRESERVATION
(115) LOS ANGELES CONSERVANCY 523 WEST SIXTH STREET, SUITE 826, LOS ANGELES, CA 90014	95-3273046	501(C)(3)	20,000				HISTORIC PRESERVATION
(116) NATHPO 1255 22ND ST NW, WASHINGTON, DC 20036	74-2893040	501(C)(3)	20,000				HISTORIC PRESERVATION
(117) STONE QUARRY HILL ART PARK 3883 STONE QUARRY ROAD, CAZENOVIA, NY 13035	16-1406217	501(C)(3)	18,000				HISTORIC PRESERVATION

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(118) NORMAN ROCKWELL MUSEUM P.O. BOX 308, STOCKBRIDGE, MA 01262	04-2450813	501(C)(3)	17,254				HISTORIC PRESERVATION
(119) THOMAS COLE HISTORIC HOUSE 218 SPRING STREET, CATSKILL, NY 12414	27-0599147	501(C)(3)	17,054				HISTORIC PRESERVATION
(120) NATIONAL PRESERVATION PARTNERS NETWORK P.O. BOX 1372, KNOXVILLE, TN 37901	83-1010033	501(C)(3)	17,000				HISTORIC PRESERVATION
(121) FILOLI CENTER, INC. 86 CANADA ROAD, WOODSIDE, CA 94062-0000	95-2996648	501(C)(3)	15,596				HISTORIC PRESERVATION
(122) COLFAX COUNTY P.O. BOX 1498, RATON, NM 87740	85-6000208	GOVERNMENT	15,000				HISTORIC PRESERVATION
(123) DC PRESERVATION LEAGUE 1328 FLORIDA AVENUE NW, WASHINGTON, DC 20009	52-1038849	501(C)(3)	15,000				HISTORIC PRESERVATION
(124) FOUNDATION FOR THE REX THEATER, CORP. P.O. BOX 66, PRIEST RIVER, ID 83856-0066	83-2752918	501(C)(3)	15,000				HISTORIC PRESERVATION
(125) HIGH LINE CANAL CONSERVANCY 4010 E ORCHARD RD, CENTENNIAL, CO 80121	81-4337938	501(C)(3)	15,000				HISTORIC PRESERVATION
(126) HOUSTON FREEDMEN'S TOWN CONSERVANCY P.O. BOX 22602, HOUSTON, TX 77227	83-2421452	501(C)(3)	15,000				HISTORIC PRESERVATION
(127) MILWAUKEE PRESERVATION ALLIANCE, INC. 1100 S. 5TH STREET, SUITE 319, MILWAUKEE, WI 53204	43-2026706	501(C)(3)	15,000				HISTORIC PRESERVATION
(128) NEWPORT RESTORATION FOUNDATION 680 BELLEVUE AVENUE, NEWPORT, RI 02840	05-0317816	501(C)(3)	15,000				HISTORIC PRESERVATION
(129) PROMONTORY POINT CONSERVANCY 5052 S WOODLAWN AVENUE, CHICAGO, IL 60615-2825	87-1456031	501(C)(3)	15,000				HISTORIC PRESERVATION
(130) PROVIDENCE PRESERVATION SOCIETY 24 MEETING STREET, PROVIDENCE, RI 02903	05-0283958	501(C)(3)	15,000				HISTORIC PRESERVATION
(131) SCANDIA HERITAGE ALLIANCE P.O. BOX 159, SCANDIA, MN 55073	83-1575163	501(C)(3)	15,000				HISTORIC PRESERVATION
(132) SCENIC AMERICA 1012 14TH STREET NORTHWEST, WASHINGTON, DC 20005	23-2188166	501(C)(3)	15,000				ROUTE 66
(133) SPANISH COLONIAL ARTS SOCIETY, INC. 750 CAMINO LEJO, SANTA FE, NM 87505	85-6011544	501(C)(3)	15,000				HISTORIC PRESERVATION
(134) THE CHINATI FOUNDATION 1 CALVARY ROW, MARFA, TX 79843-1135	74-2340423	501(C)(3)	15,000				HISTORIC PRESERVATION
(135) TOWN OF WHATELY 4 SANDY LANE, SOUTH DEERFIELD, MA 01373	04-6001364	GOVERNMENT	14,000				HISTORIC PRESERVATION

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(136) VILLA FINALE MUSEUM & GARDENS 401 KING WILLIAM, SAN ANTONIO, TX 78204	81-4436786	501(C)(3)	13,610				HISTORIC PRESERVATION
(137) ANN NORTON SCULPTURE GARDENS 253 BARCELONA ROAD, WEST PALM BCH, FL 33401	59-1874060	501(C)(3)	13,000				HISTORIC PRESERVATION
(138) LAFAYETTE AVENUE PRESBYTERIAN CHURCH 85 SO. OXFORD STREET, BROOKLYN, NY 11217	11-1633515	501(C)(3)	12,000				HISTORIC PRESERVATION
(139) THE COUSE-SHARP HISTORIC SITE 146 KIT CARSON ROAD, TAOS, NM 87571	85-0479005	501(C)(3)	12,000				HISTORIC PRESERVATION
(140) DEMUTH FOUNDATION 120 E. KING STREET, LANCASTER, PA 17602	23-2176299	501(C)(3)	11,250				HISTORIC PRESERVATION
(141) ACRES HOSPITALITY GROUP LLC - ACRES INN 107 W MADISON STREET, PONTIAC, IL 61764-1811	82-1608780	PARTNERSHIP	10,000				ROUTE 66
(142) AFRICAN SCIENTIFIC RESEARCH INSTITUTE 1422 WILLOW BROOK COVE, ST. LOUIS, MO 63146	83-0374800	501(C)(3)	10,000				HISTORIC PRESERVATION
(143) ALLIANCE FOR HISTORIC WYOMING P.O. BOX 123, LARAMIE, WY 82073	36-4578284	501(C)(3)	10,000				HISTORIC PRESERVATION
(144) ARIZONA PRESERVATION FOUNDATION P.O. BOX 13492, PHOENIX, AZ 85002	86-0371336	501(C)(3)	10,000				HISTORIC PRESERVATION
(145) ASSEMBLY HOUSE 150 INC. 150 EDWARD STREET, BUFFALO, NY 14201	47-4138885	501(C)(3)	10,000				HISTORIC PRESERVATION
(146) BEARS EARS PARTNERSHIP P.O. BOX 338, BLUFF, UT 84512	35-2426283	501(C)(3)	10,000				HISTORIC PRESERVATION
(147) BETHEL AME CHURCH P.O. BOX 225, SMYRNA, DE 19977	37-1778194	501(C)(3)	10,000				HISTORIC PRESERVATION
(148) BIGTEXAN STEAK RANCH, INC. P.O. BOX 37000, AMARILLO, TX 79120	75-2684112	S CORPORATION	10,000				ROUTE 66
(149) CALIFORNIA HISTORIC ROUTE 66 ASSOCIATION 13782 BEAR VALLEY ROAD. D-3. 267, VICTORVILLE, CA 92392	95-4319784	501(C)(3)	10,000				ROUTE 66
(150) CALIFORNIA STATE PARKS 17571 TESLA ROAD, LIVERMORE, CA 94550	94-6001347	GOVERNMENT	10,000				HISTORIC PRESERVATION
(151) CINEFEMME 1014 BROADWAY #477, SANTA MONICA, CA 90401	52-2374579	501(C)(3)	10,000				ROUTE 66
(152) CIRCLE CINEMA FOUNDATION INC. 8 SOUTH LEWIS AVE, TULSA, OK 74104	05-0527339	501(C)(3)	10,000				ROUTE 66
(153) CITY OF BUENA VISTA 2039 SYCAMORE AVE, BUENA VSITA, VA 24416	54-6001179	GOVERNMENT	10,000				HISTORIC PRESERVATION
(154) CORE OF MCLEAN P.O. BOX 294, MCLEAN, IL 61754	45-2908830	501(C)(3)	10,000				ROUTE 66

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(155) FRIENDS OF BALBOA PARK 1549 EL PRADO, STE. 1, SAN DIEGO, CA 92101	33-0849518	501(C)(3)	10,000				HISTORIC PRESERVATION
(156) GLENDORA HISTORICAL SOCIETY 314 N GLENDORA AVE, GLENDORA, CA 91741	95-4182070	501(C)(3)	10,000				ROUTE 66
(157) GREENWOOD RISING 23 NORTH GREENWOOD AVENUE, TULSA, OK 74120	85-3774435	501(C)(3)	10,000				ROUTE 66
(158) GRIZZLY CONTRACTING & SUPPLY CO. (FORMERLY BW BUILDERS LLC) 5893 SE 68TH STREET, GALENA, KS 66739	88-1598897	LLC - PARTNERSHIP	10,000				ROUTE 66
(159) HILLSIDE ENTERPRISES, LLC 2 N HILLSIDE STREET, FLAGSTAFF, AZ 86001	86-0878792	LLC - C CORP	10,000				ROUTE 66
(160) HISTORIC BOULDER, INC. 1200 PEARL STREET, SUITE 314, BOULDER, CO 80302	23-7223041	501(C)(3)	10,000				HISTORIC PRESERVATION
(161) HISTORIC KETCHIKAN P.O. BOX 23364, KETCHIKAN, AK 99901	94-3130652	501(C)(3)	10,000				HISTORIC PRESERVATION
(162) HUALAPAI TRIBE P.O. BOX 179, PEACH SPRINGS, AZ 86434	86-0092282	GOVERNMENT	10,000				ROUTE 66
(163) MAIN STREET EUREKA SPRINGS P.O. BOX 144, EUREKA SPRINGS, AR 72632	26-4332678	501(C)(3)	10,000				HISTORIC PRESERVATION
(164) SAN FRANCISCO C&C DBA MELS DRIVE IN 1670 LINCOLN BLVD., SANTA MONICA, CA 90404	94-2908374	LLC - PARTNERSHIP	10,000				ROUTE 66
(165) MR DZ RT 66 DINER GIFT SHOP 119 E ANDY DEVINE, KINGMAN , AZ 86401	99-5004970	LLC - PARTNERSHIP	10,000				ROUTE 66
(166) NEATO WORKS LLC 165 ARNOLD AVE, ST. PETERS, MO 63376	82-4253868	LLC - PARTNERSHIP	10,000				ROUTE 66
(167) OAK GROVE SCHOOL HERITAGE CENTER P. .O BOX 257, GALLION, AL 36742	83-2835747	501(C)(3)	10,000				HISTORIC PRESERVATION
(168) O'BRIEN TIRE & SERVICE CENTER, INC. 3924 NAMEOKI ROAD, GRANITE CITY, IL 62040	37-1048782	S CORPORATION	10,000				ROUTE 66
(169) PECOS RIVER CABINS 20 RIVER CABIN ROAD, PECOS, NM 87552	57-1180641	LLC - PARTNERSHIP	10,000				ROUTE 66
(170) ROUTE 66 ROAD AHEAD PARTNERSHIP 108 SW ARCH STREET, ATLANTA, IL 61723	81-3387871	501(C)(3)	10,000				ROUTE 66
(171) SAN FRANCISCO C&C P.O. BOX 82219, LAS VEGAS, NV 89180	94-2908374	PARTNERSHIP	10,000				ROUTE 66
(172) SOUTHWEST COLORADO CANYONS ALLIANCE P.O. BOX 113, CORTEZ, CO 81321	46-2801804	501(C)(3)	10,000				HISTORIC PRESERVATION

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(173) THE BALLSTON BROTHERS LLC DBA DOWNTOWN SERVICE STATION 117 EAST HISTORIC ROUTE 66, WAYNESVILLE, MO 65583	87-2068358	PARTNERSHIP	10,000				ROUTE 66
(174) THE EDWARDS STORE, INC. 1329 CLASSEN DRIVE, OKLAHOMA CITY, OK 73103	83-2004469	501(C)(3)	10,000				HISTORIC PRESERVATION
(175) THE EDWARDSVILLE TOWN SQUARES 802 HILLSBORO AVENUE, EDWARDSVILLE, IL 62025	93-3973732	LLC - C CORP	10,000				ROUTE 66
(176) THE FRIENDS OF FORT FREMONT HISTORICAL PARK, INC. P.O. BOX 982, ST. HELENA ISLAND, SC 29920	27-0944846	501(C)(3)	10,000				HISTORIC PRESERVATION
(177) THE ILLINOIS ROCK & ROLL MUSEUM ON ROUTE 66 9 W CASS STREET, JOLIET, IL 60432	82-2293229	501(C)(3)	10,000				ROUTE 66
(178) THE LAKE VIEW CEMETERY FOUNDATION 12316 EUCLID AVENUE, CLEVELAND, OH 44106	34-1429875	501(C)(3)	10,000				HISTORIC PRESERVATION
(179) THE L'ENFANT TRUST 1307 NEW HAMPSHIRE AVENUE NW, WASHINGTON, DC 20036	52-1154054	501(C)(3)	10,000				HISTORIC PRESERVATION
(180) TOWN OF SWAMPSCOTT 22 MONUMENT AVENUE, SWAMPSCOTT , MA 01907	04-6001318	GOVERNMENT	10,000				HISTORIC PRESERVATION
(181) TULSA AIR AND SPACE MUSEUM, INC. 3624 NORTH 74TH EAST AVENUE, TULSA, OK 74115-6322	73-1452965	501(C)(3)	10,000				ROUTE 66
(182) UNIVERSITY OF COLORADO DENVER UCD, GRANTS AND CONTRACTS, MAIL STO, AURORA, CO 80045-2571	84-6000555	501(C)(3)	10,000				HISTORIC PRESERVATION
(183) WANANALUA CONGREGATIONAL CHURCH P.O. BOX 188, HANA, HI 96713	99-0090478	501(C)(3)	10,000				HISTORIC PRESERVATION
(184) WESTERN MOTEL 437866 E HWY 60, VINITA, OK 74301	46-0568547	LLC - PARTNERSHIP	10,000				ROUTE 66
(185) WESTSIDE LILOS 22855 HISTORIC ROUTE 66, SELIGMAN, AZ 86337	86-0825835	LLC - PARTNERSHIP	10,000				ROUTE 66
(186) WING LUKE MUSEUM OF THE ASIAN PACIFIC AMERICAN EXPERIENCE P.O. BOX 3025, SEATTLE, WA 98114	91-6067431	501(C)(3)	10,000				HISTORIC PRESERVATION
(187) WINSLOW THEATER 115 N. KINSLEY AVENUE, WINSLOW, AZ 86047	82-2059160	S CORPORATION	10,000				ROUTE 66
(188) ZERO TOLERANCE COFFEE AND CACAO, LLC 919 W. BRITTON RD, OKLAHOMA CITY, OK 73114	83-2975387	LLC - C CORP	10,000				ROUTE 66

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(189) JCO CREATION INCORPORATED 5989 STATE HWY 70, CLARENDON, TX 79226	87-1881947	S CORPORATION	9,638				ROUTE 66
(190) SAM AND ALFREDA MALOOF FOUNDATION FOR ARTS AND CRAFTS 5131 CARNELIAN STREET, RANCHO CUCAMONGA, CA 91701	33-0631685	501(C)(3)	9,276				ROUTE 66
(191) ENZWEILER BUILDING INSTITUTE 2751 CIRCLEPORT DRIVE, ERLANGER, KY 41018	88-4312556	501(C)(3)	9,250				HISTORIC PRESERVATION
(192) HISTORIC SANTA FE FOUNDATION 545 CANYON ROAD, SANTA FE, NM 87501	85-6011261	501(C)(3)	9,019				HISTORIC PRESERVATION
(193) FRIENDS OF HISTORIC HEISHMAN'S MILL (FHHM) 1206 CREEK ROAD, CARLISLE, PA 17015, CARLISLE, PA 17015	88-4132103	501(C)(3)	9,000				HISTORIC PRESERVATION
(194) THE EVERGREEN CHORALE (DBA OVATION WEST PERFORMING ARTS) ONWES P.O. BOX 2103, EVERGREEN, CO 80437	51-0152778	501(C)(3)	8,796				HISTORIC PRESERVATION
(195) ALLEGHENY HISTORIC PRESERVATION SOCIETY 971 BEECH AVENUE, PITTSBURGH, PA 15233	25-1574970	501(C)(3)	8,667				HISTORIC PRESERVATION
(196) CITY OF HARLINGEN 118 E. TYLER AVENUE, HARLINGEN, TX 78550	74-6001047	GOVERNMENT	8,000				HISTORIC PRESERVATION
(197) CONNECTICUT LANDMARKS AMOS BULL HOUSE, HARTFORD, CT 06106	06-0789151	501(C)(3)	8,000				HISTORIC PRESERVATION
(198) CANTERBURY SHAKER VILLAGE 288 SHAKER ROAD, CANTERBURY, NH 03224	23-7035275	501(C)(3)	7,500				HISTORIC PRESERVATION
(199) CITY PRESBYTERIAN CHURCH 829 NW 13TH STREET, OKLAHOMA CITY, OK 73106	45-1655962	501(C)(3)	7,500				HISTORIC PRESERVATION
(200) COLUMBIA UNIVERSITY W 116TH ST & BROADWAY, NEW YORK, NY 10027	13-5598093	501(C)(3)	7,500				HISTORIC PRESERVATION
(201) DES MOINES COUNTY HISTORICAL SOCIETY 501 N 4TH STREET, BURLINGTON, IA 52601	42-1001602	501(C)(3)	7,500				HISTORIC PRESERVATION
(202) INDEPENDENCE BOULEVARD CHRISTIAN CHURCH 606 GLADSTONE AVENUE, KANSAS CITY, MO 64124	35-0868116	501(C)(3)	7,500				HISTORIC PRESERVATION
(203) RANCHO 6400 E. BIXBY HILL ROAD, LONG BEACH, CA 90815	33-0083942	501(C)(3)	7,500				HISTORIC PRESERVATION
(204) THE FRANK LLOYD WRIGHT HOUSE IN EBSWORTH PARK 120 N BALLAS RD, SAINT LOUIS, MO 63122-3405	43-1727003	501(C)(3)	7,500				HISTORIC PRESERVATION

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(205) MIDDLESBORO JEWISH CEMETERY 100 HEBREW CEMETERY RD, MIDDLESBORO, KY 40965	85-3596172	501(C)(3)	7,250				HISTORIC PRESERVATION
(206) LEBANON-LACLEDE COUNTY ROUTE 66 SOCIETY P.O. BOX 66, LEBANON, MO 65536	81-4664889	501(C)(3)	5,900				ROUTE 66
(207) SANGAMON DONUTS LLC 217 E. LAUREL, SPRINGFIELD, IL 62704	84-2172168	S CORPORATION	5,876				ROUTE 66
(208) ALEXANDER HAMILTON MEMORIAL FREE LIBRARY 45 EAST MAIN STREET, WAYNESBORO, PA 17268	23-1352316	501(C)(3)	5,385				HISTORIC PRESERVATION
(209) ROUTE 66 WORLD LLC 19720 LAWRENCE 2062, MILLER, MO 65707	47-1034468	LLC - PARTNERSHIP	5,350				ROUTE 66

Part IV

Supplemental Information. Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

Return Reference - Identifier	Explanation
SCHEDULE I, PART I, LINE 2 - PROCEDURES FOR MONITORING USE OF GRANT FUNDS	GRANT RECIPIENTS ARE REQUIRED TO SUBMIT A FINAL REPORT AT THE END OF THE PROJECT WITHIN ONE YEAR OF THE DATE OF THE DISBURSEMENT. GRANTEES MUST SUBMIT A BUDGET AND STATE HOW THE FUNDS WERE USED AT THE END OF THE PROJECT. IF A FUNDING MATCH IS REQUIRED, PROOF OF THE RECEIPTS IS REQUIRED.

SCHEDULE J (Form 990)
(Rev. January 2025)
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* for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization
NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number
53-0210807

Part I Questions Regarding Compensation

			Yes	No
1a	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. ☐ First-class or charter travel ☐ Travel for companions ☑ Tax indemnification and gross-up payments ☐ Discretionary spending account ☐ Housing allowance or residence for personal use ☐ Payments for business use of personal residence ☐ Health or social club dues or initiation fees ☐ Personal services (such as maid, chauffeur, chef)			
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	1b	✔	
2	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?	2	✔	
3	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. ☑ Compensation committee ☐ Independent compensation consultant ☑ Form 990 of other organizations ☑ Written employment contract ☑ Compensation survey or study ☑ Approval by the board or compensation committee			
4	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:			
a	Receive a severance payment or change-of-control payment?	4a	✔	
b	Participate in or receive payment from a supplemental nonqualified retirement plan?	4b	✔	
c	Participate in or receive payment from an equity-based compensation arrangement?	4c		✔
	If "Yes" to any of lines 4a–c, list the persons and provide the applicable amounts for each item in Part III.			
	Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5–9.			
5	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:			
a	The organization?	5a		✔
b	Any related organization?	5b		✔
	If "Yes" on line 5a or 5b, describe in Part III.			
6	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:			
a	The organization?	6a		✔
b	Any related organization?	6b		✔
	If "Yes" on line 6a or 6b, describe in Part III.			
7	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	7		✔
8	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	8		✔
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	9		

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	CAROL QUILLEN PRESIDENT & CEO	(i)	499,087	0	7,149	0	18,575	524,811	0
		(ii)	0	0	0	0	0	0	0
2	JO ANN MCELWAIN CHIEF DEVELOPMENT OFFICER	(i)	325,469	0	774	16,343	12,340	354,926	0
		(ii)	0	0	0	0	0	0	0
3	TABITHA ALMQUIST CHIEF ADMINISTRATIVE OFFICER	(i)	266,657	16,148	270	12,669	12,668	308,412	0
		(ii)	0	0	0	0	0	0	0
4	THOMPSON M. MAYES CHIEF LEGAL OFFICER & CORPORATE SECRETARY	(i)	266,850	0	2,286	13,576	20,523	303,235	0
		(ii)	0	0	0	0	0	0	0
5	DEMOND LEGGS EXEC DIR, AACHAF & SR VP, NTHP	(i)	249,816	0	414	11,598	12,340	274,168	0
		(ii)	0	0	0	0	0	0	0
6	DENISE WISE VP OF FINANCE & CONTROLLER (FORMER INTERIM CFO 5-11/24)	(i)	229,309	0	774	6,278	21,185	257,546	0
		(ii)	0	0	0	0	0	0	0
7	PATRICIA WINTERTON VP OF PHILANTHROPY	(i)	198,956	0	180	9,952	25,150	234,238	0
		(ii)	0	0	0	0	0	0	0
8	OMAR EATON-MARTINEZ SR VP, HISTORIC SITES	(i)	194,458	0	414	10,173	25,150	230,195	0
		(ii)	0	0	0	0	0	0	0
9	SUSAN LATTANZI VP OF INFORMATION TECHNOLOGY & REAL ESTATE	(i)	195,009	0	774	10,101	12,340	218,224	0
		(ii)	0	0	0	0	0	0	0
10	ROBERT NIEWEG SR VP FOR PRESERVATION SERVICES & OUTREACH	(i)	200,274	0	1,188	9,711	5,450	216,623	0
		(ii)	0	0	0	0	0	0	0
11	MARIANNA KNIGHT FORMER VP, HUMAN RESOURCES (THRU 2/24)	(i)	29,068	0	175,996	10,226	137	215,427	0
		(ii)	0	0	0	0	0	0	0
12	SHAW SPRAGUE VP FOR GOVERNMENT RELATIONS	(i)	177,129	0	376	9,037	25,128	211,670	0
		(ii)	0	0	0	0	0	0	0
13	MICHELLE HORTON VP OF INSTITUTIONAL PARTNERSHIPS & STRATEGY	(i)	201,884	0	253	7,596	808	210,541	0
		(ii)	0	0	0	0	0	0	0
14	EDWARD WHITAKER ACTING CHIEF MARKETING OFFICER	(i)	177,396	0	1,065	6,996	18,916	204,373	0
		(ii)	0	0	0	0	0	0	0
15	ELIZABETH S MERRITT DEPUTY GENERAL COUNSEL	(i)	192,182	0	0	9,543	0	201,725	0
		(ii)	0	0	0	0	0	0	0
16	SEE NEXT PAGE	(i)							
		(ii)							

Part II **Officers, Directors, Trustees, Key Employees and Highest Compensated Employees** (continued)

(a) Name		(b) Breakdown of W-2 and/or 1099-MISC compensation			(c) Retirement and other deferred compensation	(d) Nontaxable benefits	(e) Total of columns (b)(i)-(d)	(f) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(16) ROSS M. BRADFORD ASSISTANT CORPORATE SECRETARY	(i)	179,787	0	240	8,962	12,314	201,303	0
	(ii)	0	0	0	0	0	0	0
(17) PATRICIA M WOODWORTH FORMER CHIEF FINANCIAL OFFICER (THRU 5/24)	(i)	126,924	0	23,507	0	144	150,575	0
	(ii)	0	0	0	0	0	0	0

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.

Return Reference - Identifier	Explanation
SCHEDULE J, PART I, LINE 4A - SEVERANCE OR CHANGE-OF-CONTROL PAYMENT	MARIANNA KNIGHT - $138,513 (POST EMPLOYMENT PAYMENT) EMPLOYEES PARTICIPATE IN 457(B) PLAN: PATRICIA WOODWORTH - $23,000
SCHEDULE J, PART I, LINE 4B - SUPPLEMENTAL NONQUALIFIED RETIREMENT PLAN	THE TRUST ADOPTED A NONQUALIFIED DEFERRED RETIREMENT SAVINGS PLAN (457(B)) FOR SENIOR MANAGEMENT AND HIGHLY COMPENSATED EMPLOYEES ON JANUARY 1, 2003. THE PLAN CURRENTLY ALLOWS ELIGIBLE EMPLOYEES TO DEFER SALARY AMOUNTS UP TO THE MAXIMUM ALLOWED UNDER IRS REGULATIONS. THE RETIREMENT COMMITTEE ADOPTED A RESOLUTION ON NOVEMBER 18, 2015 SPECIFYING THAT A SELECT GROUP OF MANAGEMENT OR HIGHLY COMPENSATED EMPLOYEES ARE ELIGIBLE TO PARTICIPATE. AS OF JUNE 30, 2025 AND 2024, ASSETS AND LIABILITIES ASSOCIATED WITH THIS PLAN ARE $641,023 AND $625,391 RESPECTIVELY.

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* for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public Inspection

Name of the organization

NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number

53-0210807

Part I Types of Property

		(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1	Art—Works of art				
2	Art—Historical treasures				
3	Art—Fractional interests				
4	Books and publications				
5	Clothing and household goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities—Publicly traded	✔	25	235,144	MARKET VALUE
10	Securities—Closely held stock				
11	Securities—Partnership, LLC, or trust interests				
12	Securities—Miscellaneous				
13	Qualified conservation contribution—Historic structures				
14	Qualified conservation contribution—Other				
15	Real estate—Residential				
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 (_____)				
26	Other (_____)				
27	Other (_____)				
28	Other (_____)				

				Yes	No
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	0		
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?	30a			✔
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		✔	
32a	Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	32a			✔
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.

Return Reference - Identifier	Explanation
SCHEDULE M, PART I - EXPLANATIONS OF REPORTING METHOD FOR NUMBER OF CONTRIBUTIONS	SECURITIES - PUBLICLY TRADED - THE NUMBER OF CONTRIBUTIONS FOR SECURITIES IS THE NUMBER OF SEPARATE DONATIONS, NOT THE NUMBER OF SHARES OF STOCK.

SCHEDULE O (Form 990)

(Rev. January 2025)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

Attach to Form 990 or Form 990-EZ.

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 TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number

53-0210807

Return Reference - Identifier	Explanation
FORM 990, PART III, LINE 4A - PROGRAM SERVICE DESCRIPTION	4) PARTNERSHIPS WITH STATE AND LOCAL PRIVATE NONPROFIT PRESERVATION GROUPS TO DEVELOP RESOURCES TO PROMOTE PRESERVATION AS A SOLUTION TO IMPORTANT NATIONAL ISSUES, SUPPORT THE FINANCIAL SUSTAINABILITY OF SIGNIFICANT HISTORIC SITES, AND ADVANCE BEST PRACTICES IN PRESERVATION.
FORM 990, PART III, LINE 4B - PROGRAM SERVICE DESCRIPTION	HISTORIC SITES - THE NATIONAL TRUST AND ITS PARTNERS ARE THE STEWARDS OF 27 NATIONAL TRUST HISTORIC SITES WHICH ARE OPEN TO THE PUBLIC. THEY ARE A NATIONALLY SIGNIFICANT COLLECTION OF HISTORIC PLACES THAT INCLUDE A WIDE VARIETY OF ARCHITECTURAL STYLES, STRUCTURES, LANDSCAPES, AND OBJECT COLLECTIONS THAT BRING DIVERSE STORIES OF AMERICAN HISTORY TO LIFE. IN 2024/2025, THE NATIONAL TRUST OWNED AND MANAGED 10 OF THESE SITES; OWNED 11 SITES (ONE THROUGH A LONG-TERM LEASE) THAT ARE MANAGED BY INDEPENDENT LOCAL ORGANIZATIONS; AND PROVIDED LIMITED SUPPORT TO SIX OTHER SITES THAT ARE OWNED AND MANAGED BY OTHER ENTITIES. THESE HISTORIC SITES WELCOMED OVER 1,282,000 VISITORS IN 2024/2025. THE HISTORY, STORIES, PEOPLE, COLLECTIONS, ARCHITECTURE, AND LANDSCAPES OF THESE SITES ARE INTERPRETED TO ON-SITE VISITORS, AND THROUGH DIGITAL PROGRAMS, SOCIAL MEDIA, WEBSITES, AND WRITTEN COMMUNICATION TO MILLIONS MORE. THE SITES SERVE THEIR COMMUNITIES BY PROVIDING EDUCATIONAL PROGRAMS, EVENTS, AND UNIQUE GATHERING PLACES FOR COMMUNITY RESIDENTS. THE NATIONAL TRUST AND ITS PARTNER ORGANIZATIONS MAINTAIN THE SITES AS GOOD MODELS FOR HISTORIC PRESERVATION, COLLECTIONS MANAGEMENT, INTERPRETATION, AND COMPREHENSIVE STEWARDSHIP.
FORM 990, PART III, LINE 4C - PROGRAM SERVICE DESCRIPTION	HISTORIC PRESERVATION & CONSERVATION: EDUCATION - COMMUNICATES THE IMPORTANCE OF HISTORIC PRESERVATION, THREATS TO HISTORIC PLACES, AND ACHIEVEMENTS IN SAVING HISTORIC PLACES TO MEMBERS AND THE PUBLIC. PRODUCES AN ANNUAL CONFERENCE, WEBINARS, AND IN-PERSON TRAININGS, QUARTERLY MAGAZINE, PROFESSIONAL JOURNAL, AUDIENCE NEWSLETTERS, AND WEBSITES TO HIGHLIGHT IMPORTANT PRESERVATION ISSUES, COMMUNICATE PRESERVATION SUCCESSES, AND STIMULATE NEW INTEREST IN HISTORIC PRESERVATION. TO INSPIRE ACTION BY THE PUBLIC, STAGES MEDIA CAMPAIGNS SUCH AS THE 11 MOST ENDANGERED HISTORIC PLACES LIST. PROVIDES INFORMATION ABOUT THE LEGAL AND POLICY ASPECTS OF HISTORIC PRESERVATION. HISTORIC PRESERVATION & CONSERVATION: MEMBERSHIP OUTREACH - EDUCATE THE GENERAL PUBLIC ON THE IMPORTANCE OF AND TECHNIQUES FOR PRESERVING THE NATION'S ARCHITECTURAL AND CULTURAL HERITAGE. HISTORIC PRESERVATION AND CONSERVATION: PUBLICATIONS INCLUDE: 1) "PRESERVATION," THE QUARTERLY MAGAZINE CHRONICLING INDIVIDUALS AND PROGRAMS WORKING TO SAVE HISTORIC PLACES; 2) "FORUM JOURNAL," A SCHOLARLY JOURNAL SERVING A NETWORK OF PRESERVATION PROFESSIONALS, STUDENTS AND VOLUNTEERS; 3) WWW.SAVINGPLACES.ORG AND WWW.SAVINGPLACES.ORG/PRESERVATION-LEADERSHIP-FORUM (PRESERVATION LEADERSHIP FORUM) OFFER ONLINE CONTENT AND EMAIL COMMUNICATIONS THAT INSPIRE AND EDUCATE THE PUBLIC AND PRESERVATIONISTS AT ALL LEVELS.
FORM 990, PART VI, LINE 1A - MATERIAL DIFFERENCES IN VOTING RIGHTS	THE EXECUTIVE COMMITTEE OF THE BOARD OF TRUSTEES CONSISTS OF THE CHAIR AND TWO VICE CHAIRS AND THE CHAIR OF EACH OF THE STANDING COMMITTEES, INCLUDING THE INVESTMENTS, FINANCE & MANAGEMENT, AUDIT, TRUSTEESHIP & GOVERNANCE, ADVANCEMENT, AND PRESERVATION & HISTORIC SITES COMMITTEES AND OTHER TRUSTEES. THE EXECUTIVE COMMITTEE SHALL HAVE AND EXERCISE ALL THE POWERS OF THE BOARD OF TRUSTEES BETWEEN THE MEETINGS OF THE BOARD OF TRUSTEES, SUBJECT TO GENERAL POLICIES ESTABLISHED BY THE BOARD, EXCEPT THAT THE FULL BOARD OF TRUSTEES SHALL RETAIN EXCLUSIVE AUTHORITY TO AMEND THE BYLAWS, TO EXERCISE THE BOARD'S AUTHORITY TO FILL TEMPORARY VACANCIES ON THE BOARD, AND TO ELECT THE CHAIR AND VICE CHAIRS OF THE CORPORATION.
FORM 990, PART VI, LINE 6 - CLASSES OF MEMBERS OR STOCKHOLDERS	THE NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES IS A MEMBER ORGANIZATION WITH 80,000 MEMBERS.
FORM 990, PART VI, LINE 7A - MEMBERS OR STOCKHOLDERS ELECTING MEMBERS OF GOVERNING BODY	THE ORGANIZATION'S MEMBERS HAVE THE RIGHT TO ELECT THE MEMBERS OF THE BOARD OF TRUSTEES (OTHER THAN STATUTORY EX-OFFICIO TRUSTEES). ELECTIONS ARE CONDUCTED AT AN ANNUAL MEMBERSHIP MEETING HELD IN CONJUNCTION WITH AN ANNUAL CONFERENCE IN THE FALL.
FORM 990, PART VI, LINE 11B - REVIEW OF FORM 990 BY GOVERNING BODY	THE FORM 990 IS PREPARED BY THE INDEPENDENT ACCOUNTING FIRM BDO USA AND REVIEWED BY MANAGEMENT. THE DRAFT IS THEN MADE AVAILABLE TO THE AUDIT COMMITTEE AND ALL BOARD MEMBERS (EITHER DIGITALLY OR IN HARD COPY DEPENDING ON THEIR PREFERENCE). ANY CHANGES FOLLOWING THESE REVIEWS ARE AGAIN REVIEWED BY BDO USA BEFORE THE FINAL 990 IS FILED.

SCHEDULE O (Form 990)

(Rev. January 2025)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

Attach to Form 990 or Form 990-EZ.

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 TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number

53-0210807

Return Reference - Identifier	Explanation
FORM 990, PART VI, LINE 12C - CONFLICT OF INTEREST POLICY	THE ORGANIZATION'S CONFLICT OF INTEREST POLICY IS SENT TO THE BOARD MEMBERS ONCE A YEAR WITH A DISCLOSURE FORM THAT ASKS TRUSTEES TO DESCRIBE INTEREST IN OR RELATIONSHIPS WITH BOTH FOR-PROFIT AND NON-PROFIT ENTITIES AND TO DESCRIBE ANY TRANSACTIONS (DIRECT OR INDIRECT) WITH THE ORGANIZATION. TRUSTEES ARE ALSO REQUIRED TO DISCLOSE ANNUALLY ANY BUSINESS OR FAMILY RELATIONSHIPS WITH OTHER TRUSTEES AND WITH OFFICERS AND KEY EMPLOYEES OF THE ORGANIZATION (IDENTIFIED BY NAME), CONSISTENT WITH THE DISCLOSURE OBLIGATION OF PART VI, LINE 2. TRUSTEES ARE REGULARLY REMINDED OF THEIR OBLIGATION UNDER THE POLICY FOR POTENTIAL TRANSACTIONS. THE POLICY ALSO PROVIDES A PROCESS FOR REVIEW OF POTENTIAL CONFLICTS.
FORM 990, PART VI, LINE 15A - PROCESS TO ESTABLISH COMPENSATION OF TOP MANAGEMENT OFFICIAL	THE ORGANIZATION'S COMPENSATION SUBCOMMITTEE OF THE EXECUTIVE COMMITTEE REVIEWS COMPENSATION OF THE PRESIDENT AND TOP MANAGEMENT STAFF (INCLUDING OFFICERS AND KEY EMPLOYEES). ALL MEMBERS OF THE COMPENSATION SUBCOMMITTEE ARE INDEPENDENT MEMBERS OF THE BOARD OF TRUSTEES. THE ORGANIZATION REGULARLY REVIEWS COMPENSATION STUDIES AND COMPARABILITY ANALYSES, AND SUCH INFORMATION FOR THE OFFICERS AND KEY EMPLOYEES IS MADE AVAILABLE TO THE COMPENSATION SUBCOMMITTEE. THE COMPENSATION SUBCOMMITTEE APPROVES COMPENSATION OF THE PRESIDENT IN ADVANCE AND IN WRITING. COMPENSATION OF THE OTHER OFFICERS AND KEY EMPLOYEES IS REVIEWED BY THE COMPENSATION SUBCOMMITTEE, BUT IS SET BY THE PRESIDENT.
FORM 990, PART VI, LINE 17 - STATES WITH WHICH A COPY OF THIS FORM 990 IS REQUIRED TO BE FILED	IL, KS, KY, MA, MD, MI, MN, MS, NC, NH, NJ, NM, NY, OR, PA, RI, SC, TN, UT, VA, WI, WV
FORM 990, PART VI, LINE 19 - REQUIRED DOCUMENTS AVAILABLE TO THE PUBLIC	THE ORGANIZATION MAKES DIGITAL COPIES OF THE STATUTORY CHARTER, BYLAWS, CONFLICT OF INTEREST POLICY, WHISTLEBLOWER POLICY, DONOR BILL OF RIGHTS, FORM 990, AND CURRENT AUDITED FINANCIAL STATEMENTS AVAILABLE ON ITS WEBSITE, WWW.SAVINGPLACES.ORG UNDER "OUR WORK", "ABOUT THE NATIONAL TRUST." THESE DOCUMENTS ARE ALSO MADE AVAILABLE TO ANY PERSON IN HARD COPY UPON REQUEST.

SCHEDULE R (Form 990)

(Rev. January 2025)

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 TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES

Employer identification number

53-0210807

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

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) NATIONAL TRUST TOURS, LLC (26-1983358) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	TRAVEL	DE	1,539,707	1,878,025	NTCIC
(2) NATIONAL TRUST INVESTMENT MANAGEMENT, LLC (81-1853785) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	0	438	NTCIC
(3) NATIONAL TRUST EQUITY, LLC (81-8121733) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	0	366,390	NTCIC
(4) NT HISTORIC REAL ESTATE EQUITY FUND, LLC (81-1911360) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	0	366,485	NTCIC
(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) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) NATIONAL MAIN STREET CENTER, INC. (46-1405965) 600 14TH ST., NW, SUITE 500, WASHINGTON, DC 20005	HISTORICAL PRESERVATION	DE	501(C)(3)	7	NTHP	✔	
(2) NT GREEN FUND, INC. (99-4302051) 600 14TH ST., NW, SUITE 500, WASHINGTON, DC 20005	CDFI	DE	501(C)(3)	12 TYPE I	NTHP	✔	
(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) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512—514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations? Yes	(h) No	(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner? Yes	(j) No	(k) Percentage ownership
(1) (SEE STATEMENT)												
(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) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity? Yes	(i) No
(1) (SEE STATEMENT)									
(2)									
(3)									
(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.

			Yes	No
Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.				
1	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?			
a	Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity	1a	✔	
b	Gift, grant, or capital contribution to related organization(s)	1b	✔	
c	Gift, grant, or capital contribution from related organization(s)	1c		✔
d	Loans or loan guarantees to or for related organization(s)	1d	✔	
e	Loans or loan guarantees by related organization(s)	1e		✔
f	Dividends from related organization(s)	1f	✔	
g	Sale of assets to related organization(s)	1g		✔
h	Purchase of assets from related organization(s)	1h		✔
i	Exchange of assets with related organization(s)	1i		✔
j	Lease of facilities, equipment, or other assets to related organization(s)	1j	✔	
k	Lease of facilities, equipment, or other assets from related organization(s)	1k		✔
l	Performance of services or membership or fundraising solicitations for related organization(s)	1l	✔	
m	Performance of services or membership or fundraising solicitations by related organization(s)	1m		✔
n	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	✔	
o	Sharing of paid employees with related organization(s)	1o	✔	
p	Reimbursement paid to related organization(s) for expenses	1p		✔
q	Reimbursement paid by related organization(s) for expenses	1q	✔	
r	Other transfer of cash or property to related organization(s)	1r		✔
s	Other transfer of cash or property from related organization(s)	1s		✔

2 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) Name of related organization	(b) Transaction type (a—s)	(c) Amount involved	(d) Method of determining amount involved
(1)	NATIONAL MAIN STREET CENTER, INC.	Q	12,809,539	BOOK VALUE
(2)	COOPER-MOLERA PRESERVATION LLC	D	5,058,062	BOOK VALUE
(3)	NATIONAL TRUST COMMUNITY INVESTMENT CORPORATION	F	4,325,000	BOOK VALUE
(4)	NT GREEN FUND, INC.	B	1,700,000	BOOK VALUE
(5)	NATIONAL TRUST COMMUNITY INVESTMENT CORPORATION	A	641,590	BOOK VALUE
(6)	(SEE STATEMENT)			

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

Part III **Identification of Related Organizations Taxable as a Partnership** (continued)

(a) Name, address and EIN of related organization	(b) Primary Activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income related, unrelated, excluded from tax under sections 512-514	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V - UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1) NATIONAL TRUST INSURANCE SERVICES, LLC (20-0590526) 24 COMMERCE STREET, BALTIMORE, MD 21202	INSURANCE AGENCY	MD	NTCIC	UNRELATED	620,365	148,368		✓		✓		99.00
(2) COOPER-MOLERA PRESERVATION, LLC (81-4665814) 1121 WHITE ROCK RD, #200, EL DORADO HILLS, CA 95762	HISTORIC SITE	CA	NTHP	RELATED	929,286	8,013,335		✓			✓	98.00
(3) NATIONAL TRUST HISTORIC REAL ESTATE DEBT FUND, LLC (81-1911756) 1155 15TH STREET NW, SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	NTHP	UNRELATED	0	0		✓		✓		99.99

Part IV Identification of Related Organizations Taxable as a Corporation or Trust (continued)

(a) Name, address and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C-corp, S-corp or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1) NATIONAL TRUST COMMUNITY INVESTMENT CORPORATION (52-2267085) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	NTHP	C CORPORATION	10,656,098	18,611,418	100.00	✓	
(2) NT SOLAR, INC. (47-1272855) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	NTCIC	C CORPORATION	6,373,789	2,539,859	100.00		✓
(3) GREENROCK CORPORATION (13-1929826) 200 LAKE ROAD, TARRYTOWN, NY 10591	MAINTENANCE	NY	NTHP	C CORPORATION	6,151,337	3,040,472	100.00	✓	
(4) CHARITABLE REMAINDER UNITRUSTS FOR NTHP (53-0210807) 600 14TH STREET NW, SUITE 500, WASHINGTON, DC 20005	CHARITABLE TR	DC	N/A	TRUST	0	0			✓
(5) PERMANENT UNITRUST (53-0210807) 600 14TH STREET NW, SUITE 500, WASHINGTON, DC 20005	CHARITABLE TR	DC	N/A	TRUST	0	0			✓
(6) NT INITIAL INVESTOR, INC. (27-3271845) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	NTCIC	C CORPORATION	0	0	100.00		✓
(7) NTCIC LIHTC MANAGER, INC. (27-4965820) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	NTCIC	C CORPORATION	0	0	100.00		✓
(8) NTCIC HTC INVEST I MANAGER, INC. (82-1167754) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	NTCIC	C CORPORATION	0	0	100.00		✓
(9) NTCIC FUND MANAGER I, INC. (82-3791474) 1155 15TH STREET, NW SUITE 300, WASHINGTON, DC 20005	COMMUNITY INVESTMENT	DE	NTCIC	C CORPORATION	0	100,450	100.00		✓

Part V **Transactions with Related Organizations** (continued)

(a) Name of other organization	(b) Transaction type (a-s)	(c) Amount Involved	(d) Method of determining amount involved
(6) NT GREEN FUND, INC.	Q	613,430	BOOK VALUE
(7) NT SOLAR, INC.	A	382,427	BOOK VALUE
(8) GREENROCK CORPORATION	Q	304,138	BOOK VALUE
(9) NATIONAL MAIN STREET CENTER, INC.	D	211,649	BOOK VALUE
(10) NATIONAL MAIN STREET CENTER, INC.	N	188,610	BOOK VALUE
(11) NATIONAL MAIN STREET CENTER, INC.	O	121,710	BOOK VALUE
(12) NATIONAL TRUST TOURS, LLC	A	83,123	BOOK VALUE
(13) NT GREEN FUND, INC.	O	69,610	BOOK VALUE
(14) COOPER-MOLERA PRESERVATION LLC	J	60,451	BOOK VALUE
(15) GREENROCK CORPORATION	L	55,000	BOOK VALUE
(16) COOPER-MOLERA PRESERVATION LLC	O	47,408	BOOK VALUE
(17) NT GREEN FUND, INC.	D	41,924	BOOK VALUE
(18) NATIONAL TRUST COMMUNITY INVESTMENT CORPORATION	O	40,300	BOOK VALUE
(19) NATIONAL TRUST INSURANCE SERVICES, LLC	A	37,598	BOOK VALUE
(20) NATIONAL TRUST COMMUNITY INVESTMENT CORPORATION	L	30,000	BOOK VALUE
(21) NATIONAL TRUST COMMUNITY INVESTMENT CORPORATION	D	26,527	BOOK VALUE
(22) NATIONAL TRUST COMMUNITY INVESTMENT CORPORATION	Q	25,369	BOOK VALUE
(23) COOPER-MOLERA PRESERVATION LLC	Q	22,022	BOOK VALUE
(24) GREENROCK CORPORATION	J	19,020	BOOK VALUE
(25) COOPER-MOLERA PRESERVATION LLC	A	14,385	BOOK VALUE