

EXTENDED TO FEBRUARY 15, 2024

Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public. Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Form 990-PF

Department of the Treasury Internal Revenue Service

For calendar year 2022 or tax year beginning APR 1, 2022, and ending MAR 31, 2023

Name of foundation: PETER G. PETERSON FOUNDATION
A Employer identification number: 26-0316905
B Telephone number: 212-542-9200
C If exemption application is pending, check here
D 1. Foreign organizations, check here
D 2. Foreign organizations meeting the 85% test, check here and attach computation
E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here
G Check all that apply: Initial return, Final return, Address change, Initial return of a former public charity, Amended return, Name change
H Check type of organization: Section 501(c)(3) exempt private foundation
I Fair market value of all assets at end of year: \$ 1,010,138,977
J Accounting method: Accrual

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), ending with 27 Subtract line 26 from line 12.

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Form **8868**  
(Rev. January 2022)

## Application for Automatic Extension of Time To File an Exempt Organization Return

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

► **File a separate application for each return.**  
► **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

### Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

<b>Type or print</b>	Name of exempt organization or other filer, see instructions.  PETER G. PETERSON FOUNDATION	Taxpayer identification number (TIN)  26-0316905
	Number, street, and room or suite no. If a P.O. box, see instructions. 888-C EIGHTH AVENUE BOX #144	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. NEW YORK, NY 10019	

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12
Form 990-T (corporation)	07		

PETER G. PETERSON FOUNDATION

- The books are in the care of ► 888-C EIGHTH AVENUE BOX #144 - NEW YORK, NY 10019

Telephone No. ► 212-542-9200

Fax No. ► \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until FEBRUARY 15, 2024, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- calendar year \_\_\_\_\_ or
- tax year beginning APR 1, 2022, and ending MAR 31, 2023.

2 If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

<b>3a</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	100,000.
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	706,396.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.**

Form **8868** (Rev. 1-2022)

MAIL TO: DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE CENTER  
OGDEN, UT 84201-0045

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<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only.		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing .....	1,625,939.	568,984.	568,984.
	2 Savings and temporary cash investments .....	228,824,419.	195,995,440.	195,995,440.
	3 Accounts receivable .....			
	Less: allowance for doubtful accounts .....			
	4 Pledges receivable .....			
	Less: allowance for doubtful accounts .....			
	5 Grants receivable .....			
	6 Receivables due from officers, directors, trustees, and other disqualified persons .....			
	7 Other notes and loans receivable .....			
	Less: allowance for doubtful accounts .....			
	8 Inventories for sale or use .....			
	9 Prepaid expenses and deferred charges .....	370,211.	3,069,792.	3,069,792.
	10a Investments - U.S. and state government obligations <span style="float: right;">STMT 7</span> .....	0.	21,252,329.	21,252,329.
	b Investments - corporate stock <span style="float: right;">STMT 8</span> .....	419,867.	160,044.	160,044.
	c Investments - corporate bonds .....			
	11 Investments - land, buildings, and equipment: basis .....			
Less: accumulated depreciation .....				
12 Investments - mortgage loans .....				
13 Investments - other <span style="float: right;">STMT 9</span> .....	819,638,173.	778,805,189.	778,805,189.	
14 Land, buildings, and equipment: basis .....				
Less: accumulated depreciation .....				
15 Other assets (describe <span style="float: right;">STATEMENT 10</span> ) .....	4,822,374.	10,287,199.	10,287,199.	
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I) .....	1,055,700,983.	1,010,138,977.	1,010,138,977.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses .....	1,416,072.	1,480,691.	
	18 Grants payable .....	14,452,745.	11,066,080.	
	19 Deferred revenue .....			
	20 Loans from officers, directors, trustees, and other disqualified persons .....			
	21 Mortgages and other notes payable .....			
	22 Other liabilities (describe <span style="float: right;">STATEMENT 11</span> ) .....	3,190,647.	3,120,283.	
	23 <b>Total liabilities</b> (add lines 17 through 22) .....	19,059,464.	15,667,054.	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29, and 30.</b>			
	24 Net assets without donor restrictions .....	1,036,641,519.	994,471,923.	
	25 Net assets with donor restrictions .....			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	26 Capital stock, trust principal, or current funds .....			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund .....			
	28 Retained earnings, accumulated income, endowment, or other funds .....			
	29 <b>Total net assets or fund balances</b> .....	1,036,641,519.	994,471,923.	
30 <b>Total liabilities and net assets/fund balances</b> .....	1,055,700,983.	1,010,138,977.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) .....	1	1,036,641,519.
2 Enter amount from Part I, line 27a .....	2	-32,650,037.
3 Other increases not included in line 2 (itemize) <u>PRIOR YEAR GRANTS RECOVERED</u> .....	3	562,279.
4 Add lines 1, 2, and 3 .....	4	1,004,553,761.
5 Decreases not included in line 2 (itemize) <u>UNREALIZED LOSS - INVESTMENTS</u> .....	5	10,081,838.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29 .....	6	994,471,923.

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**Part IV Capital Gains and Losses for Tax on Investment Income** SEE ATTACHED STATEMENT

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e	34,206,301.	41,353,797.	-7,147,496.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			-7,147,496.

2 Capital gain net income or (net capital loss) <span style="font-size: small;">{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 .....</span>	2	-7,147,496.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 .....	3	N/A

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)		83,423.
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b) .....		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) .....	2	0.
3 Add lines 1 and 2 .....	3	83,423.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) .....	4	0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- .....	5	83,423.
6 Credits/Payments:		
a 2022 estimated tax payments and 2021 overpayment credited to 2022 .....	6a	706,396.
b Exempt foreign organizations - tax withheld at source .....	6b	0.
c Tax paid with application for extension of time to file (Form 8868) .....	6c	0.
d Backup withholding erroneously withheld .....	6d	0.
7 Total credits and payments. Add lines 6a through 6d .....	7	706,396.
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached .....	8	0.
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than 7, enter <b>amount owed</b> .....	9	
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> .....	10	622,973.
11 Enter the amount of line 10 to be: <b>Credited to 2023 estimated tax</b> <span style="float: right;">622,973.    <b>Refunded</b></span>	11	0.

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**Part VI-A Statements Regarding Activities**

		Yes	No
<b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? .....	<b>1a</b>		X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition ..... If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.	<b>1b</b>		X
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? .....	<b>1c</b>		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ _____ 0. (2) On foundation managers. \$ _____ 0.			
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ _____ 0.			
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? .....	<b>2</b>		X
If "Yes," attach a detailed description of the activities.			
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes .....	<b>3</b>		X
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? .....	<b>4a</b>	X	
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? .....	<b>4b</b>	X	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? .....	<b>5</b>		X
If "Yes," attach the statement required by <i>General Instruction T</i> .			
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? .....	<b>6</b>	X	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV .....	<b>7</b>	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered. See instructions. _____ <u>CO, MA, NY, OH</u>			
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation .....	<b>8b</b>	X	
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the tax year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII .....	<b>9</b>		X
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses .....	<b>10</b>		X
<b>11</b> At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions .....	<b>11</b>		X
<b>12</b> Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions .....	<b>12</b>		X
<b>13</b> Did the foundation comply with the public inspection requirements for its annual returns and exemption application? .....	<b>13</b>	X	
Website address <u>WWW.PGPF.ORG</u>			
<b>14</b> The books are in care of <u>PETER G. PETERSON FOUNDATION</u> Telephone no. <u>212-542-9200</u> Located at <u>888-C EIGHTH AVENUE BOX #144, NEW YORK, NY</u> ZIP+4 <u>10019</u>			
<b>15</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> - check here ..... <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ..... <b>15</b> N/A	<b>15</b>		N/A
<b>16</b> At any time during calendar year 2022, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? .....	<b>16</b>		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country			

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

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

	Yes	No
<b>1a</b> During the year, did the foundation (either directly or indirectly):		
<b>(1)</b> Engage in the sale or exchange, or leasing of property with a disqualified person? .....	<b>1a(1)</b>	X
<b>(2)</b> Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .....	<b>1a(2)</b>	X
<b>(3)</b> Furnish goods, services, or facilities to (or accept them from) a disqualified person? .....	<b>1a(3)</b>	X
<b>(4)</b> Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .....	<b>1a(4)</b>	X
<b>(5)</b> Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? .....	<b>1a(5)</b>	X
<b>(6)</b> Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) .....	<b>1a(6)</b>	X
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions .....	<b>1b</b>	X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
<b>d</b> Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2022? .....	<b>1d</b>	X
<b>2</b> Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
<b>a</b> At the end of tax year 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022? .....	<b>2a</b>	X
If "Yes," list the years _____, _____, _____, _____		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement - see instructions.) .....	<b>2b</b>	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. _____, _____, _____, _____		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? .....	<b>3a</b>	X
<b>b</b> If "Yes," did it have excess business holdings in 2022 as a result of <b>(1)</b> any purchase by the foundation or disqualified persons after May 26, 1969; <b>(2)</b> the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or <b>(3)</b> the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2022.) .....	<b>3b</b>	N/A
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .....	<b>4a</b>	X
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022? .....	<b>4b</b>	X

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**Part VI-B** Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

		Yes	No
<b>5a</b> During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<b>5a(1)</b>		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<b>5a(2)</b>		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<b>5a(3)</b>		X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<b>5a(4)</b>		X
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<b>5a(5)</b>		X
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	<b>5b</b>		X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>			
<b>d</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <span style="float: right;">N/A</span>	<b>5d</b>		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>6a</b>		X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	<b>6b</b>		X
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<b>7a</b>		X
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? <span style="float: right;">N/A</span>	<b>7b</b>		
<b>8</b> Is the foundation 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?	<b>8</b>		X

**Part VII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		1738164	180300.	5,249.

**2** Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JAY WANT - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	SENIOR ADVISOR 25.00	239,653.	23,965.	0.
ZAHRA ELMEKKAWY - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	DIR, DELIVERY SYSTEM INNOVATION 40.00	223,963.	22,396.	0.
SUSAN TANAKA - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	SENIOR POLICY ADVISOR 20.00	199,000.	19,900.	0.
JEFFREY SELBERG - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	SENIOR ADVISOR 20.00	198,400.	19,840.	0.
PRABHJOT SINGH - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	SR ADVISOR, STRATEGIC INITIATIVES 15.00	213,512.	0.	0.

**Total** number of other employees paid over \$50,000 35

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

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
EAST END ADVISORS, LLC - 610 FIFTH AVENUE, SUITE 506, NEW YORK, NY 10020	INVESTMENT MGMT	2,314,490.
FRANK N MAGID ASSOCIATES, INC - 8500 NORMANDE LAKE BLVD STE 630, MINNEAPOLIS, MN	RESEARCH	829,416.
ADOLESCENT CONTENT LLC 829 SUPERBA AVE., VENICE, CA 90291	COMMUNICATIONS	818,339.
RATIONAL 360 - 1828 L STREET, NW, SUITE 640, WASHINGTON, DC 20036	COMMUNICATIONS	585,859.
NORC AT THE UNIVERSITY OF CHICAGO - 55 EAST MONROE STREET, 20TH FLOOR, CHICAGO, IL 60603	RESEARCH	441,000.
<b>Total</b> number of others receiving over \$50,000 for professional services .....		<b>34</b>

**Part VIII-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
<b>1</b> _____ SEE STATEMENT 13	24,659,798.
<b>2</b> _____ SEE STATEMENT 14	10,104,133.
<b>3</b> _____ SEE STATEMENT 15	2,902,002.
<b>4</b> _____	

**Part VIII-B Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
<b>1</b> CIVICA, INC. - PROGRAM RELATED INVESTMENT USED TO PROVIDE HIGH-NEEDS POPULATIONS WITH TIMELY ACCESS TO ESSENTIAL GENERIC DRUGS AT AFFORDABLE PRICES.	4,994,404.
<b>2</b> _____	
All other program-related investments. See instructions.	
<b>3</b> _____	
<b>Total.</b> Add lines 1 through 3 .....	<b>4,994,404.</b>

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities .....	<b>1a</b>	215,330,747.
b	Average of monthly cash balances .....	<b>1b</b>	56,099,810.
c	Fair market value of all other assets (see instructions) .....	<b>1c</b>	743,791,250.
d	<b>Total</b> (add lines 1a, b, and c) .....	<b>1d</b>	1,015,221,807.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) .....	<b>1e</b>	0.
2	Acquisition indebtedness applicable to line 1 assets .....	<b>2</b>	0.
3	Subtract line 2 from line 1d .....	<b>3</b>	1,015,221,807.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	<b>4</b>	15,228,327.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	<b>5</b>	999,993,480.
6	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	<b>6</b>	49,999,674.

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

1	Minimum investment return from Part IX, line 6 .....	<b>1</b>	49,999,674.
2a	Tax on investment income for 2022 from Part V, line 5 .....	<b>2a</b>	83,423.
b	Income tax for 2022. (This does not include the tax from Part V.) .....	<b>2b</b>	
c	Add lines 2a and 2b .....	<b>2c</b>	83,423.
3	Distributable amount before adjustments. Subtract line 2c from line 1 .....	<b>3</b>	49,916,251.
4	Recoveries of amounts treated as qualifying distributions .....	<b>4</b>	562,279.
5	Add lines 3 and 4 .....	<b>5</b>	50,478,530.
6	Deduction from distributable amount (see instructions) .....	<b>6</b>	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1 .....	<b>7</b>	50,478,530.

**Part XI Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 .....	<b>1a</b>	45,628,148.
b	Program-related investments - total from Part VIII-B .....	<b>1b</b>	4,994,404.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes .....	<b>2</b>	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required) .....	<b>3a</b>	
b	Cash distribution test (attach the required schedule) .....	<b>3b</b>	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4 .....	<b>4</b>	50,622,552.

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

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
<b>1</b> Distributable amount for 2022 from Part X, line 7 .....				50,478,530.
<b>2</b> Undistributed income, if any, as of the end of 2022:				
<b>a</b> Enter amount for 2021 only .....			45,742,954.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2022:				
<b>a</b> From 2017 .....				
<b>b</b> From 2018 .....				
<b>c</b> From 2019 .....				
<b>d</b> From 2020 .....				
<b>e</b> From 2021 .....				
<b>f</b> Total of lines 3a through e .....	0.			
<b>4</b> Qualifying distributions for 2022 from Part XI, line 4: \$ 50,622,552.				
<b>a</b> Applied to 2021, but not more than line 2a ...			45,742,954.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions) ...		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) .....	0.			
<b>d</b> Applied to 2022 distributable amount .....				4,879,598.
<b>e</b> Remaining amount distributed out of corpus .....	0.			
<b>5</b> Excess distributions carryover applied to 2022 (If an amount appears in column (d), the same amount must be shown in column (a).) .....	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 .....	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b .....		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed .....		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions .....		0.		
<b>e</b> Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount - see instr. ...			0.	
<b>f</b> Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023 .....				45,598,932.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) .....	0.			
<b>8</b> Excess distributions carryover from 2017 not applied on line 5 or line 7 .....	0.			
<b>9</b> Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a .....	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2018 ...				
<b>b</b> Excess from 2019 ...				
<b>c</b> Excess from 2020 ...				
<b>d</b> Excess from 2021 ...				
<b>e</b> Excess from 2022 ...				

**Part XIII Private Operating Foundations** (see instructions and Part VI-A, question 9) N/A

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling \_\_\_\_\_

**b** Check box to indicate whether the foundation is a private operating foundation described in section \_\_\_\_\_  4942(j)(3) or  4942(j)(5)

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

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

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

JOAN GANZ COONEY

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**  
 Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed:  
 PETER G. PETERSON FOUNDATION, 212-542-9200, INQUIRIES@PGPF.ORG  
 888-C EIGHTH AVENUE, BOX #144, NEW YORK, NY 10019

**b** The form in which applications should be submitted and information and materials they should include:  
 SEE STATEMENT 19

**c** Any submission deadlines:  
 SEE STATEMENT 19

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:  
 SEE STATEMENT 19

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**Part XIV** **Supplementary Information** *(continued)*

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient <small>Name and address (home or business)</small>	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>				
<b>Total</b> ..... <b>SEE CONTINUATION SHEET(S)</b> .....				<b>3a</b> 26,506,470.
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> ..... <b>SEE CONTINUATION SHEET(S)</b> .....				<b>3b</b> 5,916,933.





**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PARTNERSHIP K-1	P		
b PARTNERSHIP - DISTRIB IN EXCESS OF BASIS	P		
c OTHER SECURITIES	P		
d SALE OF PARTNERSHIP INTERESTS	P		
e 457(F) PLAN	P		
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a		2,443,455.	-2,443,455.
b	51,921.		51,921.
c	34,154,380.	38,902,187.	-4,747,807.
d		8,077.	-8,077.
e		78.	-78.
f			0.
g			0.
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-2,443,455.
b			51,921.
c			-4,747,807.
d			-8,077.
e			-78.
f			0.
g			0.
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) ..... { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } .....	2	-7,147,496.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 .....	3	N/A

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**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RESEARCH 1789 MASSACHUSETTS AVENUE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
ASSOCIATION FOR PUBLIC POLICY ANALYSIS AND MANAGEMENT 1100 VERMONT AVENUE NW, SUITE 650 WASHINGTON, DC 20005-6347		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	13,500.
BIPARTISAN POLICY CENTER 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO PRODUCE BIPARTISAN RESEARCH AND ANALYSIS ON FISCAL AND ECONOMIC POLICY SOLUTIONS, INCLUDING POLICIES TO RECOVER FROM THE COVID-19 PANDEMIC.	500,000.
BIPARTISAN POLICY CENTER* 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO ANALYZE CURRENT TRENDS AND OPPORTUNITIES IN DIGITAL HEALTHCARE TECHNOLOGY, AND ITS ROLE IN IMPROVING QUALITY AND LOWERING COSTS.	250,000.
BIPARTISAN POLICY CENTER 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO DEVELOP AND ANALYZE BIPARTISAN POLICY SOLUTIONS THAT STRENGTHEN AND IMPROVE THE SUSTAINABILITY OF THE SOCIAL SECURITY PROGRAM.	225,000.
BIPARTISAN POLICY CENTER 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO ADVANCE BIPARTISAN SOLUTIONS TO THE DEBT LIMIT IMPASSE THROUGH OUTREACH, EDUCATION AND AWARENESS INITIATIVES.	125,000.
BIPARTISAN POLICY CENTER 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	90,250.
<b>Total from continuation sheets</b>				<b>26,506,470.</b>

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BRANDEIS UNIVERSITY* 415 SOUTH STREET, MSC 110 WALTHAM, MA 02453-2728		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVENUE, NW WASHINGTON, DC 20036-2103		PC	TO UPDATE, MAINTAIN, AND PROMOTE THE FISCAL SHIP, AN ONLINE GAME THAT CHALLENGES PLAYERS TO PUT THE FEDERAL BUDGET ON A SUSTAINABLE COURSE.	30,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVENUE, NW WASHINGTON, DC 20036-2103		PC	TO ANALYZE THE FEDERAL TAX BASE AND DEVELOP POLICY ALTERNATIVES FOR THE TAXATION OF CAPITAL INCOME.	10,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVENUE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
BROWN UNIVERSITY OF PROVIDENCE 121 SOUTH MAIN STREET PROVIDENCE, RI 02912		PC	TO SUPPORT THE VARTAN GREGORIAN SCHOLARS TO HONOR HIS CONTRIBUTIONS TO PHILANTHROPY AND INCREASE STUDENT DIVERSITY.	650,000.
BROWN UNIVERSITY OF PROVIDENCE* 121 SOUTH MAIN STREET PROVIDENCE, RI 02912		PC	TO SUPPORT A STATEWIDE HEALTHCARE IMPROVEMENT INITIATIVE IN RHODE ISLAND.	38,999.
BUSINESS EXECUTIVES FOR NATIONAL SECURITY 1030 15TH STREET NW, SUITE 200 E WASHINGTON, DC 20005-1503		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	35,000.
<b>Total from continuation sheets</b> .....				

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CAMDEN COALITION OF HEALTHCARE PROVIDERS* 800 COOPER STREET, 7TH FL CAMDEN, NJ 08102-1155		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
CATO INSTITUTE 1000 MASSACHUSETTS AVENUE NW WASHINGTON, DC 20001-5401		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	10,250.
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW, SUITE 100E WASHINGTON, DC 20005-4746		PC	TO SUPPORT POLICY RESEARCH AND ANALYSIS TO REDUCE THE COSTS AND IMPROVE THE QUALITY OF U.S. HEALTHCARE.	80,000.
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW, SUITE 100E WASHINGTON, DC 20005-4746		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
CENTER FOR HEALTH CARE STRATEGIES* 300 AMERICAN METRO BLVD., SUITE 125 HAMILTON, NJ 08619-2320		PC	TO DEVELOP THE BETTER CARE PLAYBOOK, AN ONLINE RESOURCE FOR STAKEHOLDERS SEEKING TO IMPROVE THE QUALITY AND LOWER THE COST OF CARE FOR HIGH-NEED PATIENTS.	100,411.
CENTER FOR HEALTH POLICY DEVELOPMENT* 10 FREE STREET, 2ND FLOOR PORTLAND, ME 04101-4865		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	20,000.
CITIZENS BUDGET COMMISSION INC. 240 WEST 35TH STREET, SUITE 302 NEW YORK, NY 10001-2506		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	54,000.
<b>Total from continuation sheets</b> .....				

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BILL HILLARY & CHELSEA CLINTON FOUNDATION 1200 PRESIDENT CLINTON AVENUE LITTLE ROCK, AR 72201-0000		PC	TO SUPPORT THE EXECUTION OF UP TO US, A NATIONWIDE NONPARTISAN INITIATIVE EMPOWERING COLLEGE STUDENTS TO EDUCATE AND ENGAGE THEIR PEERS ON AMERICA'S FISCAL CHALLENGES AND THE IMPACT ON THEIR FUTURE.	250,000.
COALITION TO TRANSFORM ADVANCED CARE* 900 16TH STREET NW, SUITE 400 WASHINGTON, DC 20043-4364		PC	TO DEVELOP AND DISSEMINATE CARE MODELS FOR SERIOUS ILLNESS, AND PREPARE POLICY RECOMMENDATIONS THAT PROMOTE BEST PRACTICES.	150,000.
COALITION TO TRANSFORM ADVANCED CARE* 900 16TH STREET NW, SUITE 400 WASHINGTON, DC 20043-4364		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1900 M STREET NW, SUITE 850 WASHINGTON, DC 20036-3536		PC	TO ADVANCE RESPONSIBLE FISCAL POLICY AND BUDGET PROCESS REFORM THROUGH POLICY RESEARCH, OUTREACH, AND PUBLIC ENGAGEMENT.	4,082,051.
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1900 M STREET NW, SUITE 850 WASHINGTON, DC 20036-3536		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
CONCORD COALITION CORP. 1530 WILSON BLVD STE 550 ARLINGTON, VA 22209-2455		PC	TO EDUCATE THE PUBLIC ABOUT THE CAUSES AND CONSEQUENCES OF FEDERAL BUDGET DEFICITS AND THE IMPORTANCE OF BUILDING A SECURE FISCAL FOUNDATION FOR ECONOMIC GROWTH.	750,000.
CONFERENCE BOARD, INC. 845 THIRD AVENUE, THIRD FLOOR NEW YORK, NY 10022-6600		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	50,000.
<b>Total from continuation sheets</b> .....				

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
COUNCIL FOR ECONOMIC EDUCATION 122 EAST 42ND ST., SUITE 2600 NEW YORK, NY 10168		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
ECONOMIC CLUB OF NEW YORK 350 5TH AVENUE, SUITE 5010 NEW YORK, NY 10118-5010		PC	TO SUPPORT THE PETER G. PETERSON LEADERSHIP EXCELLENCE AWARD.	20,000.
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW, SUITE 600 WASHINGTON, DC 20005-5960		PC	TO SUPPORT PUBLIC EDUCATION, ENGAGEMENT AND RESEARCH ON FISCAL POLICY.	200,000.
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW, SUITE 600 WASHINGTON, DC 20005-5960		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
ELECTION TRUST INITIATIVE, LLC 901 E STREET, NW WASHINGTON, DC 20004		PC	TO SUPPORT NONPARTISAN INITIATIVES TO IMPROVE THE SYSTEM FOR ADMINISTERING ELECTIONS IN THE UNITED STATES.	5,000,000.
FISCAL CHALLENGE, INC. 115 TUCKERS POND DRIVE CHAPEL HILL, NC 27516-4390		SO I	TO SUPPORT A COMPETITION FOR COLLEGE STUDENTS TO DEVELOP BUDGET PLANS THAT STABILIZE FEDERAL DEBT AS A SHARE OF THE ECONOMY OVER THE LONG TERM.	109,000.
HARVARD UNIVERSITY* 1033 MASSACHUSETTS AVE., SUITE 3 CAMBRIDGE, MA 02138		PC	TO DEVELOP AND DISSEMINATE A TOOLKIT TO SUPPORT EFFECTIVE IMPLEMENTATION OF INNOVATIONS IN HEALTHCARE.	75,000.
<b>Total from continuation sheets</b> .....				

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
HARVARD UNIVERSITY* 1033 MASSACHUSETTS AVE., SUITE 3 CAMBRIDGE, MA 02138		PC	TO IDENTIFY AND ASSESS FACTORS WHICH ENABLE EFFECTIVE IMPLEMENTATION OF INNOVATIONS IN HEALTHCARE.	29,586.
HOWARD UNIVERSITY 2244 10TH STREET, ROOM 302 WASHINGTON, DC 20059-0001		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS AND PROMOTE INCLUSION IN FISCAL AND ECONOMIC POLICYMAKING THROUGH SUPPORT OF THE AMERICAN ECONOMIC ASSOCIATION SUMMER TRAINING PROGRAM, IN PARTNERSHIP WITH THE WOMENS INSTITUTE FOR SCIENCE, EQUITY, AND RACE.	200,000.
ICAHN SCHOOL OF MEDICINE AT MOUNT SINAI* 55 W 125 STREET, SUITE 1302 NEW YORK, NY 10027		PC	TO ACCELERATE THE ADOPTION OF PALLIATIVE CARE STRATEGIES THAT IMPROVE QUALITY AND LOWER THE COST OF CARE FOR PATIENTS WITH SERIOUS ILLNESS.	14,215.
INDEPENDENT SECTOR 1602 L STREET NW, SUITE 900 WASHINGTON, DC 20036-5682		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
INSTITUTE FOR CLINICAL AND ECONOMIC REVIEW* 14 BEACON STREET, SUITE 800 BOSTON, MA 02108-3704		PC	TO DEVELOP METHODS FOR THE ASSESSMENT OF DIGITAL HEALTH TECHNOLOGIES.	450,000.
ISSUE ONE 1401 K STREET NW, SUITE 350 WASHINGTON, DC 20005-4574		PC	TO SUPPORT EDUCATION AND AWARENESS ABOUT BIPARTISAN REFORMS TO THE FEDERAL ELECTION CERTIFICATION PROCESS.	175,000.
JOINT CENTER FOR POLITICAL AND ECONOMIC STUDIES, INC. 633 PENNSYLVANIA AVE NW WASHINGTON, DC 20004-2605		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
<b>Total from continuation sheets</b> .....				

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**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
KFF (THE HENRY J. KAISER FAMILY FOUNDATION)* 185 BERRY STREET, SUITE 2000 SAN FRANCISCO, CA 94107-1704		PC	TO SUPPORT AND EXPAND THE PETERSON-KAISER HEALTH SYSTEM TRACKER, A RESOURCE TO MONITOR PERFORMANCE OF THE U.S. HEALTHCARE SYSTEM.	920,000.
KFF (THE HENRY J. KAISER FAMILY FOUNDATION) 185 BERRY STREET, SUITE 2000 SAN FRANCISCO, CA 94107-1704		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
LIBRARY OF CONGRESS 101 INDEPENDENCE AVENUE SE WASHINGTON, DC 20540-4860		GOV	TO SUPPORT THE CONGRESSIONAL RESEARCH SERVICES BIPARTISAN SEMINAR FOR NEW MEMBERS.	68,000.
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC. 52 VANDERBILT AVENUE NEW YORK, NY 10017-3808		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	50,000.
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC. 52 VANDERBILT AVENUE NEW YORK, NY 10017-3808		PC	TO DEVELOP POLICY RESEARCH PAPERS ON FISCAL ISSUES AND SOLUTIONS.	20,147.
MERCATUS CENTER INC. 3434 WASHINGTON BLVD ARLINGTON, VA 22201-4540		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
MILBANK MEMORIAL FUND* 645 MADISON AVENUE, 15TH FLOOR NEW YORK, NY 10022-1010		EOF	TO HELP STATES DEVELOP AND IMPLEMENT COST GROWTH TARGETS TO IMPROVE HEALTHCARE AFFORDABILITY.	1,355,000.
<b>Total from continuation sheets</b> .....				

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MINNESOTA PUBLIC RADIO 480 CEDAR STREET ST. PAUL, MN 55101		SO I	TO SUPPORT THE CREATION AND DISSEMINATION OF INFORMATION THAT INCREASES AWARENESS OF THE NATION'S FISCAL CHALLENGES.	200,000.
NABE FOUNDATION OF THE NATIONAL ASSOCIATION FOR BUSINESS ECONOMICS 1020 19TH STREET NW, SUITE 550 WASHINGTON, DC 20036		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	40,000.
NATIONAL ACADEMY OF SOCIAL INSURANCE 1441 L STREET NW, SUITE 530 WASHINGTON, DC 20005		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
NATIONAL ASSOCIATION OF HEALTH DATA ORGANIZATIONS* 965 E CENTER STREET PROVO, UT 84606-3535		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	5,000.
NATIONAL BUREAU OF ECONOMIC RESEARCH INC. 1050 MASSACHUSETTS AVENUE CAMBRIDGE, MA 02138-5359		PC	TO SUPPORT A POST-DOCTORAL FELLOWSHIP PROGRAM ON LONG-TERM FISCAL POLICY.	233,000.
NATIONAL TAX ASSOCIATION TAX INSTITUTE OF AMERICA 1100 VERMONT AVENUE NW, SUITE 650 WASHINGTON, DC 20005-6347		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	20,000.
NET IMPACT 1333 BROADWAY STREET, SUITE 250 OAKLAND, CA 94612-2081		PC	TO SUPPORT THE EXECUTION OF UP TO US, A NATIONWIDE NONPARTISAN INITIATIVE EMPOWERING COLLEGE STUDENTS TO EDUCATE AND ENGAGE THEIR PEERS ON AMERICA'S FISCAL CHALLENGES AND THE IMPACT ON THEIR FUTURE.	3,350,000.
<b>Total from continuation sheets</b> .....				

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NISKANEN CENTER 820 1ST STREET NE, SUITE 675 WASHINGTON, DC 20002-8039		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
NORTHWESTERN UNIVERSITY* 750 N. LAKE SHORE DRIVE CHICAGO, IL 60611-4579		PC	TO SUPPORT THE DEVELOPMENT OF A SHARED DECISION MAKING MODEL FOR HIGH-NEED PATIENTS.	296,061.
NUCLEAR THREAT INITIATIVE, INC. 1776 EYE STREET NW, SUITE 600 WASHINGTON, DC 20006		PC	TO SUPPORT NTI'S EFFORT TO IMPROVE GLOBAL NUCLEAR SECURITY THROUGH RESEARCH ON NUCLEAR MATERIALS SECURITY AND THE ENGAGEMENT AND DEVELOPMENT OF LEADERSHIP NETWORKS OF NUCLEAR EXPERTS AND POLICYMAKERS WORLDWIDE.	3,000,000.
NUCLEAR THREAT INITIATIVE, INC. 1776 EYE STREET NW, SUITE 600 WASHINGTON, DC 20006		PC	TO IMPROVE GLOBAL BIOSECURITY BY ESTABLISHING A NEW INTERNATIONAL ENTITY FOR OVERSIGHT AND COLLABORATION ON SECURITY AND BIOTECHNOLOGY.	100,000.
THE PANETTA INSTITUTE FOR PUBLIC POLICY 100 CAMPUS CENTER, BUILDING 86E CSU MONTEREY BAY SEASIDE, CA 93955		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	15,000.
PROGRESSIVE POLICY INSTITUTE 1156 15TH STREET NW, SUITE 400 WASHINGTON, DC 20005		PC	TO SUPPORT POLICY RESEARCH AND OUTREACH RELATING TO FISCAL SUSTAINABILITY.	525,000.
PROGRESSIVE POLICY INSTITUTE 1156 15TH STREET NW, SUITE 400 WASHINGTON, DC 20005		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,250.
<b>Total from continuation sheets</b> .....				

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SADIE COLLECTIVE 712 H STREET NE PMB 94370 WASHINGTON, DC 20002-3627		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	27,500.
TRUSTEES OF TUFTS COLLEGE 169 HOLLAND STREET SOMERVILLE, MA 02144-2401		SO I	TO PRODUCE AND DISSEMINATE NON-PARTISAN ANALYSES BY LEADING ECONOMISTS ON TIMELY FISCAL AND ECONOMIC ISSUES.	97,000.
UNIVERSITY OF CHICAGO 6054 S DREXEL AVE, SUITE 400 CHICAGO, IL 60637-0000		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS AND PROMOTE GREATER INCLUSION IN FISCAL AND ECONOMIC POLICYMAKING.	220,000.
UNIVERSITY OF WASHINGTON* 4333 BROOKLYN AVE NE SEATTLE, WA 98195		GOV	TO CREATE THE FIRST NATIONWIDE DATASET OF U.S. HEALTHCARE EXPENDITURES AND VALUE AT THE COUNTY LEVEL.	1,080,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW WASHINGTON, DC 20024-2274		PC	TO SUPPORT TAX POLICY CENTER'S FEDERAL TAX MODEL AND RESEARCH AND ANALYSIS OF FISCAL POLICY DEVELOPMENTS.	471,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW WASHINGTON, DC 20024-2274		PC	TO INCREASE AWARENESS AND IMPROVE UNDERSTANDING OF THE DRIVERS OF AMERICAS FISCAL CHALLENGES.	122,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW WASHINGTON, DC 20024-2274		PC	TO SUPPORT KIDS' SHARE, A PROJECT MEASURING SPENDING ON CHILDREN IN THE FEDERAL BUDGET.	77,000.
<b>Total from continuation sheets</b> .....				



# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BIPARTISAN POLICY CENTER, INC. 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO DEVELOP AND ANALYZE BIPARTISAN POLICY SOLUTIONS THAT STRENGTHEN AND IMPROVE THE SUSTAINABILITY OF THE SOCIAL SECURITY PROGRAM.	50,000.
BIPARTISAN POLICY CENTER, INC. 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO ADVANCE BIPARTISAN SOLUTIONS TO THE DEBT LIMIT IMPASSE THROUGH OUTREACH, EDUCATION AND AWARENESS INITIATIVES.	25,000.
BIPARTISAN POLICY CENTER, INC. 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	18,000.
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1900 M. STREET NW, SUITE 850 WASHINGTON, DC 20036-3536		PC	TO ADVANCE RESPONSIBLE FISCAL POLICY AND BUDGET PROCESS REFORM THROUGH POLICY RESEARCH, OUTREACH, AND PUBLIC ENGAGEMENT.	2,625,000.
ECONOMIC CLUB OF NEW YORK 350 5TH AVENUE, SUITE 5010 NEW YORK, NY 10118-5010		PC	TO SUPPORT THE PETER G. PETERSON LEADERSHIP EXCELLENCE AWARD.	80,000.
FISCAL CHALLENGE, INC. 115 TUCKERS POND DRIVE CHAPEL HILL, NC 27516-4390		SO I	TO SUPPORT A COMPETITION FOR COLLEGE STUDENTS TO DEVELOP BUDGET PLANS THAT STABILIZE FEDERAL DEBT AS A SHARE OF THE ECONOMY OVER THE LONG TERM.	2,933.
INSTITUTE FOR CLINICAL AND ECONOMIC REVIEW* 14 BEACON STREET, SUITE 800 BOSTON, MA 02108-3704		PC	TO DEVELOP METHODS FOR THE ASSESSMENT OF DIGITAL HEALTH TECHNOLOGIES.	50,000.
<b>Total from continuation sheets</b> .....				<b>5,916,933.</b>

# Public Inspection Copy

**Part XIV** **Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MILBANK MEMORIAL FUND* 645 MADISON AVENUE, 15TH FLOOR NEW YORK, NY 10022-1010		EOF	TO HELP STATES DEVELOP AND IMPLEMENT COST GROWTH TARGETS TO IMPROVE HEALTHCARE AFFORDABILITY.	2,045,000.
MINNESOTA PUBLIC RADIO 480 CEDAR STREET ST. PAUL, MN 55101		SO I	TO SUPPORT THE CREATION AND DISSEMINATION OF INFORMATION THAT INCREASES AWARENESS OF THE NATION'S FISCAL CHALLENGES.	250,000.
NET IMPACT 1333 BROADWAY, SUITE 250 OAKLAND, CA 94612-2081		PC	TO SUPPORT THE EXECUTION OF UP TO US, A NATIONWIDE NONPARTISAN INITIATIVE EMPOWERING COLLEGE STUDENTS TO EDUCATE AND ENGAGE THEIR PEERS ON AMERICA'S FISCAL CHALLENGES AND THE IMPACT ON THEIR FUTURE.	116,000.
PROGRESSIVE POLICY INSTITUTE 1156 15TH STREET NW, SUITE 400 WASHINGTON, DC 20005		PC	TO SUPPORT RESEARCH, ANALYSIS AND OUTREACH TO PROMOTE FISCAL SUSTAINABILITY.	250,000.
UNIVERSITY OF CHICAGO 6054 S DREXEL AVENUE, SUITE 400 CHICAGO, IL 60637-0000		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS AND PROMOTE GREATER INCLUSION IN FISCAL AND ECONOMIC POLICYMAKING.	80,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW WASHINGTON, DC 20024-2274		PC	TO INCREASE AWARENESS AND IMPROVE UNDERSTANDING OF THE DRIVERS OF AMERICAS FISCAL CHALLENGES.	135,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW WASHINGTON, DC 20024-2274		PC	TO SUPPORT TAX POLICY CENTER'S FEDERAL TAX MODEL AND RESEARCH AND ANALYSIS OF FISCAL POLICY DEVELOPMENTS.	100,000.
<b>Total from continuation sheets</b> .....				



# Public Inspection Copy

## Schedule B (Form 990)

Department of the Treasury  
Internal Revenue Service

## Schedule of Contributors

Attach to Form 990 or Form 990-PF.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

# 2022

Name of the organization

PETER G. PETERSON FOUNDATION

Employer identification number

26-0316905

Organization type (check one):

### Filers of:

### Section:

Form 990 or 990-EZ

501(c)( ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

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

### General Rule

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or 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).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2022)

# Public Inspection Copy

Name of organization  PETER G. PETERSON FOUNDATION	Employer identification number  26-0316905
--	--

**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	JOAN GANZ COONEY  888-C EIGHTH AVENUE BOX # 144  NEW YORK, NY 10019	\$ 7,500,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____  _____  _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

# Public Inspection Copy

Name of organization  PETER G. PETERSON FOUNDATION	Employer identification number  26-0316905
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**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
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____

# Public Inspection Copy

Name of organization  PETER G. PETERSON FOUNDATION	Employer identification number  26-0316905
--	--

**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 info. once.) \$ \_\_\_\_\_  
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
<b>(e) Transfer of gift</b>			
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
<b>(e) Transfer of gift</b>			
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
<b>(e) Transfer of gift</b>			
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
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

# Public Inspection Copy

PETER G. PETERSON FOUNDATION

26-0316905

FORM 990-PF

OTHER INCOME

STATEMENT 1

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP - ORDINARY TRADE/BUSINESS	0.	2,557,467.	
PARTNERSHIP - ROYALTY INCOME	0.	1,240,035.	
PARTNERSHIP - OTHER PORTFOLIO INCOME	0.	1,351,339.	
PARTNERSHIP - OTHER INCOME	0.	3,050,192.	
PARTNERSHIP - CANCELLATION OF DEBT	0.	8,967.	
PARTNERSHIP - SUSPENDED LOSSES	0.	118,167.	
PRI ACCRUED INTEREST INCOME	339,498.	339,498.	
DEFERRED EXCISE TAXES	97,833.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	437,331.	8,665,665.	

FORM 990-PF

LEGAL FEES

STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	533,108.	0.		510,199.
TO FM 990-PF, PG 1, LN 16A	533,108.	0.		510,199.

FORM 990-PF

ACCOUNTING FEES

STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDIT & ACCOUNTING FEES	99,500.	0.		100,250.
PROFESSIONAL TAX FEES	88,481.	0.		97,906.
TO FORM 990-PF, PG 1, LN 16B	187,981.	0.		198,156.

# Public Inspection Copy

PETER G. PETERSON FOUNDATION

26-0316905

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMMUNICATIONS	100,818.	0.		107,818.
OTHER PROFESSIONAL FEES	215,580.	0.		215,000.
HUMAN RESOURCES	349,963.	0.		361,916.
INFORMATION TECHNOLOGY	711,014.	0.		646,295.
INVESTMENT MANAGEMENT	2,314,490.	2,314,490.		0.
<b>TO FORM 990-PF, PG 1, LN 16C</b>	<b>3,691,865.</b>	<b>2,314,490.</b>		<b>1,331,029.</b>

FORM 990-PF

TAXES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX EXPENSE	63,654.	0.		0.
PARTNERSHIP - FOREIGN TAXES	0.	285,635.		0.
<b>TO FORM 990-PF, PG 1, LN 18</b>	<b>63,654.</b>	<b>285,635.</b>		<b>0.</b>

FORM 990-PF

OTHER EXPENSES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MEDIA AND ADVERTISING	1,684,845.	0.		1,788,453.
OTHER PROGRAM EXPENSES	6,101,455.	0.		5,883,474.
OTHER MISCELLANEOUS EXPENSES	317,791.	0.		261,724.
K-1 OTHER PORTFOLIO DEDUCTIONS	0.	3,044.		0.
K-1 INVESTMENT INTEREST EXPENSE	0.	625,441.		0.
K-1 OTHER DEDUCTIONS	0.	5,253,296.		0.
K-1 ROYALTY DEDUCTIONS	0.	186,590.		0.
<b>TO FORM 990-PF, PG 1, LN 23</b>	<b>8,104,091.</b>	<b>6,068,371.</b>		<b>7,933,651.</b>

# Public Inspection Copy

PETER G. PETERSON FOUNDATION

26-0316905

FORM 990-PF

U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

STATEMENT 7

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U S A TREAS NOTES 2.0% 04/30/2024 DTD 05/01/2017	X		6,613,266.	6,613,266.
U S A TREAS NOTES 2.125% 03/31/2024 DTD 03/31/2017	X		14,639,063.	14,639,063.
TOTAL U.S. GOVERNMENT OBLIGATIONS			21,252,329.	21,252,329.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			21,252,329.	21,252,329.

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EDITAS MEDICINE INC	160,044.	160,044.
TOTAL TO FORM 990-PF, PART II, LINE 10B	160,044.	160,044.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ABRAMS CAPITAL PARTNERS II, LP	FMV	2,930,850.	2,930,850.
ACACIA PROPERTY CORPORATION 2022	FMV	2,054,385.	2,054,385.
ACE REDPOINT OPPORTUNITY CHINA, LP	FMV	771,463.	771,463.
ACE REDPOINT VENTURES CHINA II, LP	FMV	2,664,959.	2,664,959.
ACE REDPOINT VENTURES CHINA III, LP	FMV	180,363.	180,363.
ACTIVUM SG FEEDER FUND V LP	FMV	7,539,530.	7,539,530.
ALLOCATED AND UNALLOCATED GOLD	FMV	35,013,938.	35,013,938.
ALTAS PARTNERS HOLDINGS (A) LP	FMV	8,262,263.	8,262,263.
ALTAS PARTNERS HOLDINGS II LP	FMV	10,631,321.	10,631,321.
AMANSA FEEDER, LTD	FMV	24,624,135.	24,624,135.
AMERICAN SECURITIES PARTNERS VI, LP	FMV	5,946,531.	5,946,531.
APH ST. AUGUSTINE HOLDINGS (A) LP	FMV	2,841,475.	2,841,475.
ARROWSTREET CAPITAL GLOBAL EQUITY ALPHA EXTENSION FUND LIMITED	FMV	45,172,510.	45,172,510.
ARTEMIS REAL ESTATE PARTNERS FUND II, LP	FMV	1,172,114.	1,172,114.
AXON PARTNERS (OFFSHORE), LTD (F/K/A TPG)	FMV	98,735.	98,735.
BAUPOST VALUE PARTNERS, LP - IV	FMV	10,299,507.	10,299,507.
BOND III, LP	FMV	225,250.	225,250.

STATEMENT(S) 7, 8, 9

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BROOKSIDE CAYMAN, LIMITED	FMV	260.	260.
CANTILLON GLOBAL EQUITY LP	FMV	63,170,717.	63,170,717.
CENTERBRIDGE CREDIT PARTNERS TE, LP	FMV	386,069.	386,069.
CEPHEI QFII CHINA TOTAL RETURN	FMV		
OFFSHORE FEEDER FUND LTD		22,679,518.	22,679,518.
CYRUS OPPORTUNITIES FUND II, LTD	FMV	10,700,195.	10,700,195.
CYRUS SELECT OPPORTUNITIES FUND, LTD	FMV	15,952,252.	15,952,252.
CYRUS SELECT OPPORTUNITIES MASTER FUND II, LTD	FMV	7,688,630.	7,688,630.
DENHAM COMMODITY PARTNERS FUND VI-A LP	FMV	5,868,205.	5,868,205.
DRAGONEER GLOBAL OFFSHORE FEEDER II, LP	FMV	8,484,709.	8,484,709.
ECHO STREET GOODCO SELECT II, LP	FMV	14,694,138.	14,694,138.
ELLIOTT INTERNATIONAL LIMITED	FMV	54,897,584.	54,897,584.
ENCAP ENERGY CAPITAL FUND IX, LP	FMV	2,218,720.	2,218,720.
ENCAP ENERGY CAPITAL FUND VIII-B, LP	FMV	3,468,639.	3,468,639.
ENCAP ENERGY CAPITAL FUND X, LP	FMV	7,235,833.	7,235,833.
ENCAP ENERGY CAPITAL FUND XI, LP	FMV	8,669,984.	8,669,984.
ENCAP FLATROCK MIDSTREAM FUND III, LP	FMV	7,204,262.	7,204,262.
ENCAP FLATROCK MIDSTREAM FUND IV, LP	FMV	5,225,620.	5,225,620.
FARALLON CAPITAL INSTITUTIONAL PARTNERS, LP	FMV	61,859,392.	61,859,392.
FELICIS FOCUS FUND I, LP	FMV	949,717.	949,717.
FELICIS VENTURES VII, LP	FMV	4,700,565.	4,700,565.
FELICIS VENTURES VIII, LP	FMV	2,626,292.	2,626,292.
FINEPOINT CAPITAL PARTNERS II, LP	FMV	690,714.	690,714.
FOLIUM AGRICULTURE FUND I PARALLEL-1 LP	FMV	11,629,832.	11,629,832.
FOLIUM TIMBER FUND I PARALLEL-1 LP	FMV	10,725,283.	10,725,283.
FORTRESS CREDIT OPPORTUNITIES FUND (B) LP	FMV	164,629.	164,629.
FPA APARTMENT OPPORTUNITY FUND VI-A, LP	FMV	2,904,160.	2,904,160.
FPA APARTMENT OPPORTUNITY FUND VII-A, LP	FMV	7,569,410.	7,569,410.
FPA APARTMENT OPPORTUNITY FUND VIII-A, LP	FMV	900,998.	900,998.
FPV FUND I, LP	FMV	1,272,378.	1,272,378.
GA RV (CLASS A) CONTINUATION, LP	FMV	2,527,954.	2,527,954.
GAOLING FEEDER, LTD	FMV	17,307.	17,307.
GARRISON REAL ESTATE FUND II LP	FMV	219,291.	219,291.
GARRISON REAL ESTATE FUND III LP	FMV	770,817.	770,817.
GENERAL ATLANTIC INVESTMENT PARTNERS I, LP	FMV	1,155,443.	1,155,443.
GOLDMAN SACHS VINTAGE FUND V (OFFSHORE), LP	FMV	377,767.	377,767.
GOODWATER CAPITAL III, LP	FMV	5,207,393.	5,207,393.
GOODWATER CAPITAL IV, LP	FMV	1,488,125.	1,488,125.
GOODWATER INFINITY II, LP	FMV	2,511,169.	2,511,169.
GSO SPECIAL SITUATIONS OVERSEAS FUND LTD	FMV	390,618.	390,618.
H CAPITAL V, LP	FMV	6,176,769.	6,176,769.

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HIGHBROOK INCOME PROPERTY FUND II, LP	FMV	274,061.	274,061.
HIGHBROOK INCOME PROPERTY FUND III, LP	FMV	4,682,907.	4,682,907.
HIGHBROOK INCOME PROPERTY FUND, LP	FMV	92,228.	92,228.
ICHIGO JAPAN FUND B	FMV	29,113,200.	29,113,200.
LCP VII (OFFSHORE), LP	FMV	609,893.	609,893.
LERER HIPPEAU SELECT FUND IV, LP	FMV	433,240.	433,240.
LERER HIPPEAU VIII, LP	FMV	436,061.	436,061.
LUMINATE CAPITAL PARTNERS II, LP	FMV	9,575,957.	9,575,957.
LUMINATE CAPITAL PARTNERS III, LP	FMV	4,986,470.	4,986,470.
MENLO SPECIAL OPPORTUNITIES III ACCESS LLC	FMV	869,038.	869,038.
NEXUS SPECIAL SITUATIONS II, LP	FMV	4,498,369.	4,498,369.
NEXUS SPECIAL SITUATIONS III, LP	FMV	5,444,169.	5,444,169.
NGP NATURAL RESOURCES X, LP	FMV	1,148,975.	1,148,975.
NUT TREE DRAWDOWN OFFSHORE FUND, LP	FMV	8,001,433.	8,001,433.
PROVIDENCE STRATEGIC GROWTH II-A LP	FMV	8,219,314.	8,219,314.
PROVIDENCE STRATEGIC GROWTH III-A LP	FMV	8,398,802.	8,398,802.
PROVIDENCE STRATEGIC GROWTH IV LP	FMV	8,877,481.	8,877,481.
PSG V LP	FMV	4,037,794.	4,037,794.
REDWOOD DRAWDOWN OFFSHORE FUND II, LP	FMV	2,598,235.	2,598,235.
RIVA CAPITAL PARTNERS III, LP	FMV	633,721.	633,721.
ROARK CAPITAL PARTNERS IV LP	FMV	7,668,251.	7,668,251.
ROARK CAPITAL PARTNERS V (TE) LP	FMV	8,882,952.	8,882,952.
ROTHWELL VENTURES I, LP	FMV	6,215,437.	6,215,437.
SDC DIGITAL INFRASTRUCTURE OPPORTUNITY FUND II, LP	FMV	9,957,000.	9,957,000.
SDC DIGITAL INFRASTRUCTURE OPPORTUNITY FUND III, LP	FMV	153,575.	153,575.
SERENITY INVESTMENT FEEDER FUND LIMITED	FMV	12,750,638.	12,750,638.
THE CHILDREN'S INVESTMENT FUND	FMV	41,891,400.	41,891,400.
TRIDENT V, LP	FMV	1,813,060.	1,813,060.
WARBURG PINCUS CHINA, LP	FMV	7,011,364.	7,011,364.
WARBURG PINCUS CHINA-SOUTHEAST ASIA II, LP	FMV	3,373,455.	3,373,455.
WARBURG PINCUS FINANCIAL SECTOR, LP	FMV	10,420,898.	10,420,898.
WARBURG PINCUS GLOBAL GROWTH 14, LP	FMV	1,959,039.	1,959,039.
WARBURG PINCUS GLOBAL GROWTH, LP	FMV	10,247,857.	10,247,857.
WARBURG PINCUS PRIVATE EQUITY XII, LP	FMV	9,663,388.	9,663,388.
WELSH, CARSON, ANDERSON & STOWE XI, LP	FMV	692,629.	692,629.
WHALE ROCK FLAGSHIP FUND LTD	FMV	13,178,116.	13,178,116.
WHITE DEER ENERGY LP II	FMV	4,184,095.	4,184,095.
TOTAL TO FORM 990-PF, PART II, LINE 13		778,805,189.	778,805,189.
		778,805,189.	778,805,189.

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PETER G. PETERSON FOUNDATION

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FORM 990-PF

OTHER ASSETS

STATEMENT 10

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SOFTWARE/DIGITAL	28,161.	24,033.	24,033.
DIVIDEND/OTHER RECEIVABLE	29,736.	137,366.	137,366.
457(F) PLAN ASSET	276,525.	303,995.	303,995.
PROGRAM RELATED INVESTMENT	4,005,596.	9,000,000.	9,000,000.
PRI INTEREST RECEIVABLE	482,356.	821,805.	821,805.
TO FORM 990-PF, PART II, LINE 15	4,822,374.	10,287,199.	10,287,199.

FORM 990-PF

OTHER LIABILITIES

STATEMENT 11

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED EXCISE TAX	2,914,122.	2,816,289.
457(F) PLAN LIABILITY	276,525.	303,994.
TOTAL TO FORM 990-PF, PART II, LINE 22	3,190,647.	3,120,283.

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PETER G. PETERSON FOUNDATION

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FORM 990-PF

PART VII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MICHAEL A. PETERSON 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	DIRECTOR, CHAIRMAN & CEO 40.00	0.	0.	0.
JOAN GANZ COONEY 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	DIRECTOR 2.00	0.	0.	0.
MICHAEL SHANKMAN 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	TREASURER 10.00	0.	0.	0.
SUK YUN WON 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	CHIEF OPERATING OFFICER 40.00	424,125.	48,013.	0.
LORETTA UCELLI 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	EVP - STRATEGY & COMMUNICATIONS 40.00	413,438.	48,344.	0.
JEFFREY HOLLAND 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VICE PRESIDENT, RESEARCH 40.00	293,110.	49,169.	0.
LAURA GORDON 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VP, COMMUNICATIONS & PUBLIC AFFAIRS 40.00	277,813.	13,891.	0.
MYRA SUNG 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VICE PRESIDENT, PROGRAMS 40.00	236,719.	20,883.	0.
CAROLINE PEARSON 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	EXECUTIVE DIRECTOR, PCH 40.00	92,959.	0.	5,249.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VII		1,738,164.	180,300.	5,249.

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PETER G. PETERSON FOUNDATION

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FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 13

## ACTIVITY ONE

FOUNDATION ACTIVITIES - SEE STATEMENT 18 FOR OVERVIEW

### GRANTS AND GRANT-MAKING

THE FOUNDATION PROVIDES GRANTS TO FUND A VARIETY OF PROJECTS AND ORGANIZATIONS THAT ADVANCE ITS MISSION. GRANTEES INCLUDE RESEARCH ORGANIZATIONS, FOUNDATIONS, UNIVERSITIES, ASSOCIATIONS, AND OTHER NOT-FOR-PROFIT ENTITIES THAT ENGAGE IN ACTIVITIES OUTLINED UNDER GRANT AGREEMENTS WITH THE FOUNDATION. THESE GRANTS SUPPORT A RANGE OF EDUCATION, ENGAGEMENT, AND RESEARCH PROJECTS AND INITIATIVES RELATED TO THE NATION'S LONG-TERM FISCAL AND ECONOMIC CHALLENGES, AS WELL AS THE KEY DRIVERS OF DEBT. A COMPLETE LISTING OF OUR PAID GRANTS IN FISCAL YEAR 2023 CAN BE FOUND IN PART XIV.

### EXPENSES

TO FORM 990-PF, PART VIII-A, LINE 1

24,659,798.

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 14

## ACTIVITY TWO

EDUCATION, AWARENESS, AND ENGAGEMENT

THE FOUNDATION'S EDUCATION, AWARENESS, AND ENGAGEMENT INITIATIVES SEEK TO IMPROVE AMERICANS' UNDERSTANDING OF AND PARTICIPATION IN SUPPORTING FISCAL SUSTAINABILITY AND ECONOMIC RESILIENCY FOR THE NEXT GENERATION. THE FOUNDATION PRODUCES INFORMATION ON FISCAL AND ECONOMIC POLICY TOPICS FOR THE GENERAL PUBLIC; CONNECTS A RANGE OF AUDIENCES WITH NON-PARTISAN RESOURCES AND INFORMATION; AND ISSUES POLICY RESEARCH BRIEFS AND STATEMENTS AROUND KEY FISCAL MILESTONES. THE FOUNDATION ENABLES BROAD DISCOURSE REGARDING FISCAL AND ECONOMIC ISSUES THROUGH ITS WEBSITES AND SOCIAL MEDIA. IN ADDITION, THE FOUNDATION HOLDS REGULAR CONVENINGS, BRINGING TOGETHER POLICY LEADERS, EXPERTS, AND ELECTED OFFICIALS FROM ACROSS THE POLITICAL AND IDEOLOGICAL SPECTRUM TO DISCUSS FISCAL AND ECONOMIC ISSUES.

### EXPENSES

TO FORM 990-PF, PART VIII-A, LINE 2

10,104,133.

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PETER G. PETERSON FOUNDATION

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FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 15

## ACTIVITY THREE

### POLICY, RESEARCH AND ANALYSIS

THE FOUNDATION PRODUCES NON-PARTISAN RESEARCH, ANALYSES, AND OTHER DATA-DRIVEN INFORMATION TO HELP MAKE COMPLEX FISCAL, HEALTHCARE, AND ECONOMIC ISSUES MORE UNDERSTANDABLE TO THE PUBLIC, THE MEDIA, POLICYMAKERS, AND OTHER STAKEHOLDERS. THE FOUNDATION'S RESEARCH AND ANALYSES ARE INCORPORATED INTO ITS EDUCATION, AWARENESS, AND ENGAGEMENT ACTIVITIES, AND ARE MADE ACCESSIBLE THROUGH MULTIPLE CHANNELS, INCLUDING THE FOUNDATION'S WEBSITES, PUBLIC COMMUNICATIONS, AND SOCIAL MEDIA.

### EXPENSES

TO FORM 990-PF, PART VIII-A, LINE 3

2,902,002.

990-PF

INVOLVEMENT WITH NONCHARITABLE ORGANIZATIONS  
PART XVI, LINE 1, COLUMN (D)

STATEMENT 16

## NAME OF NONCHARITABLE EXEMPT ORGANIZATION

CIVICA, INC.

## DESCRIPTION OF TRANSFERS, TRANSACTIONS, AND SHARING ARRANGEMENTS

PROGRAM RELATED INVESTMENT CONSISTS OF A CREDIT FACILITY AGREEMENT. AS OF MARCH 31, 2023, \$9,000,000 WAS DRAWN AGAINST THE CREDIT AGREEMENT AND INTEREST OF \$821,805 WAS ACCRUED. AS OF MARCH 31, 2023, \$9,821,805 WAS DRAWN AGAINST THE CREDIT AGREEMENT INCLUDING INTEREST. SEE STATEMENT 21 FOR FURTHER DETAILS.

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PETER G. PETERSON FOUNDATION

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990-PF

AFFILIATION WITH TAX-EXEMPT ORGANIZATIONS  
PART XVI, LINE 2, COLUMN (C)

STATEMENT 17

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NAME OF AFFILIATED OR RELATED ORGANIZATION

CIVICA, INC.

DESCRIPTION OF RELATIONSHIP WITH AFFILIATED OR RELATED ORGANIZATION

A DIRECTOR OF CIVICA, INC. WAS APPOINTED BY THE PETER G. PETERSON FOUNDATION.

NAME OF AFFILIATED OR RELATED ORGANIZATION

PETERSON SOLUTIONS FUND

DESCRIPTION OF RELATIONSHIP WITH AFFILIATED OR RELATED ORGANIZATION

COMMON DIRECTOR

GENERAL EXPLANATION

STATEMENT 18

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART VIII-A - SUMMARY OF DIRECT CHARITABLE ACTIVITIES

EXPLANATION:

FOUNDATION ACTIVITIES

THE PETER G. PETERSON FOUNDATION'S MISSION IS TO INCREASE PUBLIC AWARENESS OF THE NATURE AND URGENCY OF THE KEY FISCAL CHALLENGES THREATENING AMERICA'S FUTURE AND TO ACCELERATE ACTION ON THEM. TO ADDRESS THESE CHALLENGES SUCCESSFULLY, WE WORK TO BRING AMERICANS TOGETHER TO FIND AND IMPLEMENT SENSIBLE, LONG-TERM SOLUTIONS THAT TRANSCEND AGE, PARTY LINES, AND IDEOLOGICAL DIVIDES IN ORDER TO ACHIEVE REAL RESULTS. WE ADVANCE OUR MISSION THROUGH GRANT-MAKING, EDUCATION AND AWARENESS INITIATIVES, AND POLICY RESEARCH AND ANALYSIS.

IN 2014, THE FOUNDATION ESTABLISHED THE PETERSON CENTER ON HEALTHCARE, AN ORGANIZATION DEDICATED TO MAKING HIGHER QUALITY, MORE AFFORDABLE HEALTHCARE A REALITY FOR ALL AMERICANS. AS A DIVISION OF THE FOUNDATION, THE CENTER IS WORKING TO TRANSFORM U.S. HEALTHCARE INTO A HIGH-PERFORMANCE SYSTEM BY FINDING INNOVATIVE SOLUTIONS THAT IMPROVE QUALITY AND LOWER COSTS, AND ACCELERATING THEIR ADOPTION ON A NATIONAL SCALE. THE CENTER COLLABORATES WITH STAKEHOLDERS ACROSS THE HEALTHCARE SYSTEM AND ENGAGES IN GRANT-MAKING, PARTNERSHIPS, AND RESEARCH.

GENERAL EXPLANATION

STATEMENT 19

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART XIV - CONTINUATION OF SUPPLEMENTARY INFORMATION

EXPLANATION:

2A: NAME & ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED:  
PETER G. PETERSON FOUNDATION  
888-C EIGHTH AVENUE, BOX #144  
NEW YORK, NY 10019  
TELEPHONE: 212-542-9200  
EMAIL: INQUIRIES@PGPF.ORG  
INQUIRIES@PETERSONHEALTHCARE.ORG

2B: FORM AND CONTENT OF APPLICATIONS:  
A BRIEF DESCRIPTION OF THE PROPOSED PROJECT VIA EMAIL, OR THE "INQUIRIES" LINK ON THE FOUNDATION'S WEBSITE.

2C: ANY SUBMISSION DEADLINES:  
INQUIRIES ARE ACCEPTED AT ANY TIME DURING THE YEAR.

2D: RESTRICTIONS OR LIMITATIONS ON AWARDS:  
PETER G. PETERSON FOUNDATION GENERAL GRANT ELIGIBILITY GUIDELINES/  
REQUIREMENTS:

THE PETER G. PETERSON FOUNDATION:

-CONSIDERS GRANT REQUESTS DIRECTLY RELATED TO THE FOUNDATION'S MISSION  
AND PRIORITIES

-GENERALLY AWARDS GRANTS TO U.S. BASED 501(C)(3) NONPROFIT  
ORGANIZATIONS

-PREFERS TO SUPPORT ORGANIZATIONS THAT HAVE BEEN IN EXISTENCE FOR AT  
LEAST TWO YEARS, WITH ANNUAL OPERATING BUDGETS OF AT LEAST \$1 MILLION

-SEEKS TO PARTNER WITH ORGANIZATIONS THAT HAVE THE ABILITY TO IMPLEMENT  
PROGRAMMING FOR NATIONAL IMPACT

THE PETER G. PETERSON FOUNDATION DOES NOT PARTICIPATE IN ACTIVITIES  
WHICH ARE PROHIBITED FOR PRIVATE FOUNDATIONS AND DOES NOT SUPPORT  
INSTITUTIONS THAT DISCRIMINATE ON THE BASIS OF, AMONG OTHER THINGS,  
RACE, RELIGION, GENDER, NATIONAL ORIGIN, AGE, DISABILITY OR SEXUAL  
ORIENTATION, IN POLICY OR IN PRACTICE. IN ADDITION THE PETER G.  
PETERSON FOUNDATION DOES NOT GENERALLY ENGAGE IN CERTAIN OTHER  
PRACTICES, INCLUDING BUT NOT LIMITED TO:

-FUNDING ORGANIZATIONS BASED OUTSIDE OF THE UNITED STATES

-GIVING GRANTS TO INDIVIDUALS

-FUNDING SOCIAL OR FRATERNAL ORGANIZATIONS

-SUPPORTING CAPITAL CAMPAIGNS, AUCTIONS, AND OTHER SIMILAR ACTIVITIES

-PROVIDING UNRESTRICTED FUNDING

-UNDERWRITING CHAIRS, ENDOWMENTS, OR ACADEMIC SCHOLARSHIPS

FOR MORE INFORMATION ON THE FOUNDATION'S GUIDELINES FOR AWARDS,  
APPLICANTS MAY VISIT OUR WEBSITE: [WWW.PGPF.ORG](http://WWW.PGPF.ORG)

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GENERAL EXPLANATION

STATEMENT 20

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FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

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FORM 990-PF, PART XIV - 3A/B

EXPLANATION:

GRANTS/CONTRIBUTIONS PAID OR APPROVED FOR FUTURE PAYMENT:

GRANTEE NAMES WITH \* AFTER THE NAME ARE GRANTS MADE FROM THE PETERSON  
CENTER ON HEALTHCARE LLC, WHICH IS A WHOLLY OWNED SUBSIDIARY OF THE  
PETER G. PETERSON FOUNDATION

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART VIII-B - EXPENDITURE RESPONSIBILITY

EXPLANATION:

PRI RECIPIENT  
CIVICA, INC.  
2912 W. EXECUTIVE PKWY  
LEHI, UT 84043

DATES AMOUNTS

10/23/2019 \$2,535,211.27  
03/31/2020 \$1,470,384.50  
07/25/2022 \$2,414,922.57  
01/18/2023 \$2,579,481.66  
ACCRUED INTEREST THROUGH 03/31/2023 \$821,805.00

PURPOSE

PROGRAM RELATED INVESTMENT, LINE OF CREDIT - TO SUPPORT PROGRAMS, INITIATIVES AND ACTIVITIES CARRIED OUT THROUGH MEMBER HOSPITALS AND HEALTH SYSTEMS THAT PROVIDE HIGH-NEEDS POPULATIONS WITH TIMELY ACCESS TO ESSENTIAL GENERIC DRUGS AT AFFORDABLE PRICES. HIGH-NEEDS POPULATIONS INCLUDE POPULATIONS IN THE FEDERAL GOVERNMENT'S 340B PROGRAM FOR DISCOUNTED DRUG PRICING FOR UNINSURED AND LOW-INCOME INDIVIDUALS. THIS POPULATION INCLUDES UNINSURED PATIENTS, PATIENTS AT OR BELOW 150% OF POVERTY LEVELS, PATIENTS WITH HIGH HEALTH CARE SPENDING (E.G., TOP 10%) AND IMPOVERISHED OR OTHERWISE VULNERABLE OR DISADVANTAGED PATIENTS SUCH AS THE DISABLED, THE FRAIL ELDERLY, AND THOSE WITH MULTIPLE CHRONIC CONDITIONS.

AMOUNTS EXPENDED

\$1,356,770

DATES OF REPORTS

AUDITED FINANCIAL STATEMENTS AS OF 12/31/19 DATED 4/20/20, AS OF 12/31/20 DATED 10/29/21, AS OF 12/31/21 DATED 5/16/2022, AND AS OF 12/31/22 DATED 3/24/2023.  
GRANTEE REPORTS DATED 4/10/2020, 6/12/2020, 12/14/2021, 6/10/2022, 3/27/2023

DIVERSION OF FUNDS

TO THE KNOWLEDGE OF THE GRANTOR, NO FUNDS HAVE BEEN DIVERTED.

VERIFICATION

THE GRANTOR HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS FROM THE PRI RECIPIENT; THEREFORE, NO INDEPENDENT VERIFICATION OF THE REPORTS WAS MADE.