

EXTENDED TO FEBRUARY 18, 2025

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

2023

Open to Public Inspection

Form 990-PF

Department of the Treasury Internal Revenue Service

For calendar year 2023 or tax year beginning APR 1, 2023, and ending MAR 31, 2024

Name of foundation: PETER G. PETERSON FOUNDATION. A Employer identification number: 26-0316905. B Telephone number: 212-542-9200. G Check all that apply: Initial return, Final return, Address change, etc. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$1,095,437,638. 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), Operating and Administrative Expenses (13-26), and Summary (27).

**Application for Extension of Time To File an Exempt Organization  
Return or Excise Taxes Related to Employee Benefit Plans**

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 up to a 6-month extension of time to file any of the forms listed below except for Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts. An extension request for Form 8870 must be sent to the IRS in a paper format (see instructions). For more details on the electronic filing of Form 8868, 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).

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.

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.

**Part I - Identification**

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

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 4720 (other than individual)	09
Form 4720 (individual)	03	Form 5227	10
Form 990-PF	04	Form 6069	11
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 8870	12
Form 990-T (trust other than above)	06	Form 5330 (individual)	13
Form 990-T (corporation)	07	Form 5330 (other than individual)	14
Form 1041-A	08		

• After you enter your Return Code, complete either Part II or Part III. Part III, including signature, is applicable only for an extension of time to file Form 5330.

• If this application is for an extension of time to file Form 5330, you must enter the following information.

Plan Name \_\_\_\_\_  
 Plan Number \_\_\_\_\_  
 Plan Year Ending (MM/DD/YYYY) \_\_\_\_\_

**Part II - Automatic Extension of Time To File for Exempt Organizations (see instructions)**

The books are in the care of **PETER G. PETERSON FOUNDATION**  
**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 18, 20 25, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

calendar year 20 \_\_\_\_\_ or  
 tax year beginning APR 1, 20 23, and ending MAR 31, 20 24

**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>	\$ 722,973.
<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>	\$ 622,973.
<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>	\$ 100,000.

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

Part II Balance Sheets		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
Assets	1 Cash - non-interest-bearing	568,984.	420,241.	420,241.
	2 Savings and temporary cash investments	195,995,440.	71,770,235.	71,770,235.
	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	3,069,792.	936,156.	936,156.
	10a Investments - U.S. and state government obligations STMT 8	21,252,329.	166,266,859.	166,266,859.
	b Investments - corporate stock STMT 9	160,044.	163,797.	163,797.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis			
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other STMT 10	778,805,189.	844,281,610.	844,281,610.	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation				
15 Other assets (describe STATEMENT 11)	10,287,199.	11,598,740.	11,598,740.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,010,138,977.	1,095,437,638.	1,095,437,638.	
Liabilities	17 Accounts payable and accrued expenses	1,480,691.	2,113,922.	
	18 Grants payable	11,066,080.	7,317,287.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe STATEMENT 12)	3,120,283.	4,004,983.	
23 Total liabilities (add lines 17 through 22)	15,667,054.	13,436,192.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions	994,471,923.	1,082,001,446.	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances	994,471,923.	1,082,001,446.		
30 Total liabilities and net assets/fund balances	1,010,138,977.	1,095,437,638.		

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	994,471,923.
2 Enter amount from Part I, line 27a	2	-5,611,349.
3 Other increases not included in line 2 (itemize) SEE STATEMENT 7	3	93,140,872.
4 Add lines 1, 2, and 3	4	1,082,001,446.
5 Decreases not included in line 2 (itemize)	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	1,082,001,446.

**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	37,472,405.	17,801,322.	19,671,083.

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			19,671,083.

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	19,671,083.
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)	1	364,930.
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	364,930.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) .....	4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- .....	5	364,930.
6 Credits/Payments:		
a 2023 estimated tax payments and 2022 overpayment credited to 2023 .....	6a	622,973.
b Exempt foreign organizations - tax withheld at source .....	6b	0.
c Tax paid with application for extension of time to file (Form 8868) .....	6c	100,000.
d Backup withholding erroneously withheld .....	6d	0.
7 Total credits and payments. Add lines 6a through 6d .....	7	722,973.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached .....	8	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed .....	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .....	10	358,043.
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax 358,043. Refunded	11	0.

Part VI-A Statements Regarding Activities

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b	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 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c	Did the foundation file Form 1120-POL for this year?		X
	d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
	e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
4b	If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7	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	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. CO, DC, IA, MA, NY, OH, VA		
8b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the tax year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.PGPF.ORG	X	
14	The books are in care of PETER G. PETERSON FOUNDATION Telephone no. 212-542-9200 Located at 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY ZIP+4 10019		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year		N/A
16	At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		X

**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):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? .....	1a(1)	X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .....	1a(2)	X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .....	1a(3)	X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .....	1a(4)	X
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? .....	1a(5)	X
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) .....	1a(6)	X
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions .....	1b	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 2023? .....	1d	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 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023? .....	2a	X
If "Yes," list the years _____, _____, _____, _____		
<b>b</b> Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) .....	2b	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to any 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? .....	3a	X
<b>b</b> If "Yes," did it have excess business holdings in 2023 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2023.) .....	3b	N/A
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .....	4a	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 2023? .....	4b	X

**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))?		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?		X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions		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?		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	N/A	
<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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A	
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		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.		X
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	
<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?		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 13		2069223	241086.	0.

**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
PRABHJOT SINGH - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	SNR ADVISOR, STRATEGIC INITIATIVES 38.00	369,197.	3,008.	0.
MAIRIN MANCINO - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	VICE PRESIDENT, POLICY 40.00	229,884.	15,900.	0.
SUSAN TANAKA - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	SENIOR POLICY ADVISOR 20.00	209,625.	20,962.	0.
JENNIFER HEETTNER - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	DIRECTOR, MONITORING & EVALUATIONS 40.00	208,288.	20,829.	0.
MEGAN BARRON - 888-C EIGHTH AVENUE BOX #144, NEW YORK, NY 10019	MANAGING DIR, ENGMT & OUTREACH 40.00	217,413.	7,587.	0.
<b>Total</b> number of other employees paid over \$50,000				38

**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	2,374,692.
MANATT, PHELPS & PHILLIPS, LLP - 2049 CENTURY PARK EAST, SUITE 1700, LOS ANGELES, CA	RESEARCH	1,278,638.
FRANK N MAGID ASSOCIATES, INC - 8500 NORMANDALE LAKE BLVD STE 630, MINNEAPOLIS, MN	RESEARCH	645,000.
NORC AT THE UNIVERSITY OF CHICAGO - 55 EAST MONROE STREET, 20TH FLOOR, CHICAGO, IL 60603	RESEARCH	635,000.
CURTA INC. 113 CHERRY ST PMB 45802, SEATTLE, WA 98104	RESEARCH	508,543.
<b>Total</b> number of others receiving over \$50,000 for professional services .....		33

**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 14	27,980,930.
<b>2</b> _____ SEE STATEMENT 15	10,683,589.
<b>3</b> _____ SEE STATEMENT 16	4,143,262.
<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> N/A	
<b>2</b> _____	
All other program-related investments. See instructions.	
<b>3</b> _____	
<b>Total.</b> Add lines 1 through 3 .....	0.

<b>Part IX</b>		<b>Minimum Investment Return</b> (All domestic foundations must complete this part. Foreign foundations, see instructions.)	
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities .....	1a	240,927,855.
b	Average of monthly cash balances .....	1b	28,047,622.
c	Fair market value of all other assets (see instructions) .....	1c	805,117,538.
d	<b>Total</b> (add lines 1a, b, and c) .....	1d	1,074,093,015.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) .....	1e	0.
2	Acquisition indebtedness applicable to line 1 assets .....	2	0.
3	Subtract line 2 from line 1d .....	3	1,074,093,015.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	4	16,111,395.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	5	1,057,981,620.
6	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	6	52,899,081.

<b>Part X</b>		<b>Distributable Amount</b> (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here <input type="checkbox"/> and do not complete this part.)	
1	Minimum investment return from Part IX, line 6 .....	1	52,899,081.
2a	Tax on investment income for 2023 from Part V, line 5 .....	2a	364,930.
b	Income tax for 2023. (This does not include the tax from Part V.) .....	2b	277,840.
c	Add lines 2a and 2b .....	2c	642,770.
3	Distributable amount before adjustments. Subtract line 2c from line 1 .....	3	52,256,311.
4	Recoveries of amounts treated as qualifying distributions .....	4	527,819.
5	Add lines 3 and 4 .....	5	52,784,130.
6	Deduction from distributable amount (see instructions) .....	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1 .....	7	52,784,130.

<b>Part XI</b>		<b>Qualifying Distributions</b> (see instructions)	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 .....	1a	47,912,584.
b	Program-related investments - total from Part VIII-B .....	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes .....	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required) .....	3a	
b	Cash distribution test (attach the required schedule) .....	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4 .....	4	47,912,584.

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

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
<b>1</b> Distributable amount for 2023 from Part X, line 7 .....				52,784,130.
<b>2</b> Undistributed income, if any, as of the end of 2023:				
<b>a</b> Enter amount for 2022 only .....			45,598,932.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2023:				
<b>a</b> From 2018 .....				
<b>b</b> From 2019 .....				
<b>c</b> From 2020 .....				
<b>d</b> From 2021 .....				
<b>e</b> From 2022 .....				
<b>f</b> Total of lines 3a through e .....	0.			
<b>4</b> Qualifying distributions for 2023 from Part XI, line 4: \$ 47,912,584.				
<b>a</b> Applied to 2022, but not more than line 2a ...			45,598,932.	
<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 2023 distributable amount .....				2,313,652.
<b>e</b> Remaining amount distributed out of corpus .....	0.			
<b>5</b> Excess distributions carryover applied to 2023 (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 2022. Subtract line 4a from line 2a. Taxable amount - see instr. ...			0.	
<b>f</b> Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024 .....				50,470,478.
<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 2018 not applied on line 5 or line 7 .....	0.			
<b>9</b> Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a .....	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2019 ...				
<b>b</b> Excess from 2020 ...				
<b>c</b> Excess from 2021 ...				
<b>d</b> Excess from 2022 ...				
<b>e</b> Excess from 2023 ...				

**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 2023, 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				(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
<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 20

**c** Any submission deadlines:

SEE STATEMENT 20

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

SEE STATEMENT 20

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

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
<b>Total</b> ..... <b>SEE CONTINUATION SHEET(S)</b> .....			<b>3a</b>	<b>24,968,422.</b>
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> ..... <b>SEE CONTINUATION SHEET(S)</b> .....			<b>3b</b>	<b>5,200,150.</b>





**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 OTHER SECURITIES	P		
c SALE OF PARTNERSHIP INTEREST - AIO IV AIV LP	P		
d SALE OF PARTNERSHIP INTEREST - FPA APARTMENT OPPORTUNITY FUND V-A, L.P.	P		
e SALE OF PARTNERSHIP INTEREST - GARRISON REAL ESTATE FUND II LP	P		
f SALE OF PARTNERSHIP INTEREST - HIGHBROOK INCOME PROPERTY FUND, LP	P		
g 457(F) PLAN	P		
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 12,864,095.			12,864,095.
b 24,270,952.		17,634,426.	6,636,526.
c		166,895.	-166,895.
d		1.	-1.
e 336,618.			336,618.
f 1.			1.
g 739.			739.
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			12,864,095.
b			6,636,526.
c			-166,895.
d			-1.
e			336,618.
f			1.
g			739.
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	19,671,083.
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

**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 ACADEMY OF POLITICAL AND SOCIAL SCIENCE 220 SOUTH 40TH STREET, 201-E PHILADELPHIA, PA 19104-3543		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	5,000.
AMERICAN ACTION FORUM, INC. 1747 PENNSYLVANIA AVE NW, SUITE 5 WASHINGTON, DC 20006-4604		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250.
AMERICAN ACTION FORUM, INC. 1747 PENNSYLVANIA AVE NW, SUITE 5 WASHINGTON, DC 20006-4604		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RESEARCH 1789 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250.
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RESEARCH 1789 MASSACHUSETTS AVE, 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, INC. 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO ADVANCE BIPARTISAN FISCAL AND ECONOMIC POLICY SOLUTIONS THROUGH RESEARCH AND PUBLIC ENGAGEMENT.	425,000.
<b>Total from continuation sheets</b>				<b>24,968,422.</b>

**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
BIPARTISAN POLICY CENTER, INC. 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.	250,000.
BIPARTISAN POLICY CENTER, INC.* 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.	225,000.
BIPARTISAN POLICY CENTER, INC. 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250.
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.	93,860.
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.	25,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO DEVELOP AND SUPPORT THE ALICE RIVLIN POST-DOCTORAL FELLOWSHIP IN FISCAL POLICY.	150,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, 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.	110,000.
<b>Total from continuation sheets</b> .....				

**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
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT RESEARCH ON THE EFFECTS OF WEALTH TRANSFERS ON THE TAX SYSTEM.	70,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.
BROWN UNIVERSITY OF PROVIDENCE 121 SOUTH MAIN STREET PROVIDENCE, RI 02903-4202		PC	TO FUND SELECTED PANDEMIC-RELATED RESEARCH PROJECTS THROUGH THE PETER G. PETERSON FOUNDATION PANDEMIC RESPONSE POLICY RESEARCH FUND.	200,000.
BUSINESS EXECUTIVES FOR NATIONAL SECURITY 1030 15TH STREET NW, SUITE 200 E WASHINGTON, DC 20005-1503		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
CENTER FOR AMERICAN PROGRESS 1333 H ST NW, SUITE 100E WASHINGTON, DC 20005-4746		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250.
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW, SUITE 100E WASHINGTON, DC 20005-4746		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
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.	5,860.
<b>Total from continuation sheets</b>				

**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
CENTER FOR HEALTH CARE STRATEGIES, INC.* 300 AMERICAN METRO BLVD., SUITE 125 HAMILTON, NJ 08619-2371		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.	139,000.
CITIZENS BUDGET COMMISSION, INC. 240 WEST 35TH ST, SUITE 302 NEW YORK, NY 10001-2506		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	28,000.
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* 601 MASSACHUSETTS AVE., NW SUITE 520 WASHINGTON, DC 20043-4364		PC	TO SUPPORT HEALTHCARE PRACTICES THAT ENSURE COMPASSIONATE, COORDINATED CARE FOR INDIVIDUALS WITH ADVANCED ILLNESS.	125,000.
COALITION TO TRANSFORM ADVANCED CARE* 601 MASSACHUSETTS AVE., NW SUITE 520 WASHINGTON, DC 20043-4364		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1025 CONNECTICUT AVENUE NW, SUITE 1100 WASHINGTON, DC 20036-3536		PC	TO ADVANCE RESPONSIBLE FISCAL POLICY AND BUDGET PROCESS REFORM THROUGH POLICY RESEARCH, OUTREACH, AND PUBLIC ENGAGEMENT.	2,543,545.
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1025 CONNECTICUT AVENUE NW, SUITE 1100 WASHINGTON, DC 20036-3536		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.
<b>Total from continuation sheets</b>				

**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
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 RESEARCH AND OUTREACH PROMOTING FISCAL SUSTAINABILITY AMONG POLICYMAKERS AND BUSINESS LEADERS.	100,000.
CONFERENCE BOARD, INC. 845 THIRD AVENUE, THIRD FLOOR NEW YORK, NY 10022-6600		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	50,000.
COUNCIL FOR ECONOMIC EDUCATION 122 EAST 42ND ST., SUITE 1012 NEW YORK, NY 10168		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
DIGITAL MEDICINE SOCIETY, INC.** 90 CANAL STREET, 4TH FL BOSTON, MA 02114-2022		PC	TO SUPPORT INTEGRATED EVIDENCE PLANS FOR DIGITAL HEALTH PRODUCTS.	100,000.
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW, SUITE 600 WASHINGTON, DC 20005-5960		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250.
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW, SUITE 600 WASHINGTON, DC 20005-5960		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.

**Total from continuation sheets** .....

**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
ELECTION TRUST INITIATIVE, LLC 901 E STREET, NW WASHINGTON, DC 20004-2037		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.	52,933.
THE FOUNDATION FOR RESEARCH ON EQUAL OPPORTUNITY 650 MASSACHUSETTS AVENUE N.W., SUITE 600 WASHINGTON, DC 20001		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.
HOWARD UNIVERSITY 2244 10TH STREET, ROOM 302 WASHINGTON, DC 20059-0001		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS THROUGH SUPPORT OF THE AMERICAN ECONOMIC ASSOCIATION SUMMER TRAINING PROGRAM, IN PARTNERSHIP WITH THE WOMENS INSTITUTE FOR SCIENCE, EQUITY, AND RACE.	200,000.
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 SUPPORT THE ASSESSMENT OF DIGITAL HEALTH TECHNOLOGIES.	125,000.
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.	1,700,000.
<b>Total from continuation sheets</b>				

**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
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.	5,860.
MANHATTAN INSTITUTE FOR POLICY RESEARCH, INC. 52 VANDERBILT AVENUE NEW YORK, NY 10017-3808		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250.
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.	120,000.
MERCATUS CENTER, INC. 3434 WASHINGTON BLVD ARLINGTON, VA 22201-4540		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.
MILBANK MEMORIAL FUND* 645 MADISON AVE, 15TH FLOOR NEW YORK, NY 10022-1010		EOF	TO HELP STATES DEVELOP AND IMPLEMENT COST GROWTH TARGETS TO IMPROVE HEALTHCARE AFFORDABILITY.	1,810,000.
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 SCIENCES* 500 FIFTH STREET, NW WASHINGTON, DC 20001		SO I	TO DEVELOP APPROACHES TO ALIGN PHARMACEUTICAL INVESTMENTS IN INNOVATION WITH UNMET HEALTH NEEDS.	350,000.
<b>Total from continuation sheets</b>				

**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
NATIONAL ACADEMY OF SOCIAL INSURANCE 1441 L ST NW, SUITE 530 WASHINGTON, DC 20005-4679		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	15,000.
NATIONAL ASSOCIATION OF HEALTH DATA ORGANIZATIONS* 965 E CENTER ST PROVO, UT 84606-3535		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	3,750.
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.	175,500.
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.	1,077,000.
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.	1,500,000.
NUCLEAR THREAT INITIATIVE, INC. 1776 EYE STREET NW, SUITE 600 WASHINGTON, DC 20006		PC	TO SUPPORT INTERNATIONAL NETWORKS TO ADVANCE NUCLEAR SAFETY AND SECURITY.	500,000.
PANETTA INSTITUTE FOR PUBLIC POLICY 100 CAMPUS CENTER BUILDING 86E SEASIDE, CA 93955-8000		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	15,000.
<b>Total from continuation sheets</b>				

**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
PETER G. PETERSON INSTITUTE FOR INTERNATIONAL ECONOMICS 1750 MASSACHUSETTS AVE NW WASHINGTON, DC 20036-1903		PC	TO SUPPORT NON-PARTISAN RESEARCH AND ANALYSIS ON GLOBAL AND DOMESTIC FISCAL AND ECONOMIC POLICY.	3,000,000.
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW, SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT RESEARCH, ANALYSIS AND OUTREACH TO PROMOTE FISCAL SUSTAINABILITY.	225,000.
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW, SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250.
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW, SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.
ROCK HEALTH FOUNDATION** 333 BUSH STREET, FL 4 SAN FRANCISCO, CA 94104-2854		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	100,000.
SADIE COLLECTIVE 712 H STREET NE PMB 94370 WASHINGTON, DC 20002-3627		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
SADIE COLLECTIVE 712 H STREET NE PMB 94370 WASHINGTON, DC 20002-3627		PC	TO DEVELOP A PROGRAM FOR HIGH SCHOOL STUDENTS THAT INCREASES DIVERSITY IN THE FIELD OF ECONOMICS.	23,000.
<b>Total from continuation sheets</b>				

**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
UNIVERSITY OF CHICAGO 6054 S DREXEL AVE, SUITE 400 CHICAGO, IL 60637-2612		PC	TO FUND SELECTED PANDEMIC-RELATED RESEARCH PROJECTS THROUGH THE PETER G. PETERSON FOUNDATION PANDEMIC RESPONSE POLICY RESEARCH FUND.	200,000.
UNIVERSITY OF CHICAGO 6054 S DREXEL AVE, SUITE 400 CHICAGO, IL 60637-2612		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS AND PROMOTE GREATER INCLUSION IN FISCAL AND ECONOMIC POLICYMAKING.	72,884.
UNIVERSITY OF SOUTHERN CALIFORNIA 3500 SOUTH FIGUEROA STREET, SUITE 102 LOS ANGELES, CA 90089-8003		SO I	TO FUND SELECTED PANDEMIC-RELATED RESEARCH PROJECTS THROUGH THE PETER G. PETERSON FOUNDATION PANDEMIC RESPONSE POLICY RESEARCH FUND.	200,000.
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.	180,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW, 2ND FLOOR WASHINGTON, DC 20024-2274		PC	TO INCREASE AWARENESS AND IMPROVE UNDERSTANDING OF THE DRIVERS OF AMERICAS FISCAL CHALLENGES.	108,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW, 2ND FLOOR WASHINGTON, DC 20024-2274		PC	TO SUPPORT KIDS' SHARE, A PROJECT MEASURING SPENDING ON CHILDREN IN THE FEDERAL BUDGET.	60,000.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW, 2ND FLOOR WASHINGTON, DC 20024-2274		PC	TO SUPPORT TAX POLICY CENTER'S FEDERAL TAX MODEL AND RESEARCH AND ANALYSIS OF FISCAL POLICY DEVELOPMENTS.	50,000.

**Total from continuation sheets** .....

**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
URBAN INSTITUTE 500 L'ENFANT PLAZA SW, 2ND FLOOR WASHINGTON, DC 20024-2274		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860.
THE VOLCKER ALLIANCE 39 BROADWAY, SUITE 1930 NEW YORK, NY 10006-3153		PC	TO RESEARCH AND REPORT ON BEST PRACTICES IN MANAGING STATE AND LOCAL BUDGETS DURING THE COVID-19 PANDEMIC, WITH A FOCUS ON NEW YORK STATE AND NEW YORK CITY.	300,000.
WASHINGTON STATE HEALTH CARE AUTHORITY* 626 8TH AVENUE SE OLYMPIA, WA 98501		GOV	TO IDENTIFY AND ADDRESS DRIVERS OF HEALTHCARE COST GROWTH IN WASHINGTON STATE.	310,100.
WOMENS CONGRESSIONAL POLICY INSTITUTE 409 12TH STREET, SUITE 702 WASHINGTON, DC 20024-2125		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000.
WOMENS INSTITUTE FOR SCIENCE EQUITY AND RACE 9291 LAUREL GROVE ROAD, SUITE 92 MECHANICSVILLE, VA 23116-3851		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS AND PROMOTE GREATER INCLUSION IN FISCAL AND ECONOMIC POLICYMAKING THROUGH SUPPORT OF THE AMERICAN ECONOMIC ASSOCIATION SUMMER TRAINING PROGRAM, HOSTED BY HOWARD UNIVERSITY.	100,000.

Total from continuation sheets .....

**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
AMERICAN ACTION FORUM, INC. 1747 PENNSYLVANIA AVE NW, SUITE 5 WASHINGTON, DC 20006-4604		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750.
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RESEARCH 1789 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750.
BIPARTISAN POLICY CENTER, INC. 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO ADVANCE BIPARTISAN FISCAL AND ECONOMIC POLICY SOLUTIONS THROUGH RESEARCH AND PUBLIC ENGAGEMENT.	100,000.
BIPARTISAN POLICY CENTER, INC. 1225 EYE STREET NW, SUITE 1000 WASHINGTON, DC 20005-3914		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750.
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.	16,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO DEVELOP POLICY REFORMS TO STABILIZE PROGRAMS THAT SUPPORT OLDER ADULTS.	150,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, 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.	76,000.
<b>Total from continuation sheets</b>				5,200,150.

**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
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT RESEARCH ON THE EFFECTS OF WEALTH TRANSFERS ON THE TAX SYSTEM.	30,000.
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036-2103		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	6,000.
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW, SUITE 100E WASHINGTON, DC 20005-4746		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750.
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.	6,000.
CENTER FOR HEALTH CARE STRATEGIES, INC.* 300 AMERICAN METRO BLVD., SUITE 125 HAMILTON, NJ 08619-2371		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.	90,000.
COALITION TO TRANSFORM ADVANCED CARE* 601 MASSACHUSETTS AVE., NW SUITE 520 WASHINGTON, DC 20043-4364		PC	TO SUPPORT HEALTHCARE PRACTICES THAT ENSURE COMPASSIONATE, COORDINATED CARE FOR INDIVIDUALS WITH ADVANCED ILLNESS.	100,000.
CONFERENCE BOARD, INC. 845 THIRD AVENUE, THIRD FLOOR NEW YORK, NY 10022-6600		SO I	TO SUPPORT RESEARCH AND OUTREACH PROMOTING FISCAL SUSTAINABILITY AMONG POLICYMAKERS AND BUSINESS LEADERS.	360,000.
<b>Total from continuation sheets</b>				

**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
DIGITAL MEDICINE SOCIETY, INC.** 90 CANAL STREET, 4TH FL BOSTON, MA 02114-2022		PC	TO SUPPORT INTEGRATED EVIDENCE PLANS FOR DIGITAL HEALTH PRODUCTS.	100,000.
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW, SUITE 600 WASHINGTON, DC 20005-5960		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750.
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.	71,000.
INSTITUTE FOR CLINICAL AND ECONOMIC REVIEW** 14 BEACON STREET, SUITE 800 BOSTON, MA 02108-0000		PC	TO SUPPORT THE ASSESSMENT OF DIGITAL HEALTH TECHNOLOGIES.	30,000.
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.	1,795,000.
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.	6,000.
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.	283,000.
<b>Total from continuation sheets</b> .....				

**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
MANHATTAN INSTITUTE FOR POLICY RESEARCH, INC. 52 VANDERBILT AVENUE NEW YORK, NY 10017-3808		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750.
NATIONAL ACADEMY OF SCIENCES* 500 FIFTH STREET, NW WASHINGTON, DC 20001		SO I	TO DEVELOP APPROACHES TO ALIGN PHARMACEUTICAL INVESTMENTS IN INNOVATION WITH UNMET HEALTH NEEDS.	150,000.
NATIONAL TAX ASSOCIATION TAX INSTITUTE OF AMERICA 1100 VERMONT AVE NW, SUITE 650 WASHINGTON, DC 20005		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	10,000.
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.	750,000.
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW, SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750.
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW, SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	6,000.
SADIE COLLECTIVE 712 H STREET NE PMB 94370 WASHINGTON, DC 20002-3627		PC	TO DEVELOP A PROGRAM FOR HIGH SCHOOL STUDENTS THAT INCREASES DIVERSITY IN THE FIELD OF ECONOMICS.	2,000.
<b>Total from continuation sheets</b>				



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.	1,714,349.	
PARTNERSHIP - ROYALTY INCOME	0.	955,451.	
PARTNERSHIP - OTHER PORTFOLIO INCOME	0.	-217,751.	
PARTNERSHIP - OTHER INCOME	0.	155,297.	
PARTNERSHIP - CANCELLATION OF DEBT	0.	276.	
OTHER INCOME FROM SECURITIES	0.	38,747.	
PRI ACCRUED INTEREST INCOME	503,558.	503,558.	
OTHER REVENUE	1,031.	1,031.	
<b>TOTAL TO FORM 990-PF, PART I, LINE 11</b>	<b>504,589.</b>	<b>3,150,958.</b>	

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	776,732.	0.		448,623.
TO FM 990-PF, PG 1, LN 16A	776,732.	0.		448,623.

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.		99,500.
PROFESSIONAL TAX FEES	109,410.	0.		42,276.
TO FORM 990-PF, PG 1, LN 16B	208,910.	0.		141,776.

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	63,000.	0.		63,000.
OTHER PROFESSIONAL FEES	212,988.	0.		212,988.
HUMAN RESOURCES	633,335.	0.		606,257.
INFORMATION TECHNOLOGY	1,220,051.	0.		1,224,413.
INVESTMENT MANAGEMENT	2,374,692.	2,374,692.		0.
TO FORM 990-PF, PG 1, LN 16C	4,504,066.	2,374,692.		2,106,658.

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	1,629,803.	0.		0.
PARTNERSHIP - FOREIGN TAXES	0.	325,652.		0.
TO FORM 990-PF, PG 1, LN 18	1,629,803.	325,652.		0.

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	1,555,822.	0.		1,614,779.
OTHER PROGRAM EXPENSES	6,851,892.	0.		7,169,367.
OTHER MISCELLANEOUS EXPENSES	454,903.	0.		439,284.
K-1 OTHER PORTFOLIO DEDUCTIONS	0.	54,872.		0.
K-1 INVESTMENT INTEREST EXPENSE	0.	980,027.		0.
K-1 OTHER DEDUCTIONS	0.	5,813,817.		0.
K-1 ROYALTY DEDUCTIONS	0.	165,866.		0.
TO FORM 990-PF, PG 1, LN 23	8,862,617.	7,014,582.		9,223,430.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 7

DESCRIPTION	AMOUNT
PRIOR YEAR GRANTS RECOVERED	527,819.
UNREALIZED GAIN - INVESTMENTS	92,613,053.
TOTAL TO FORM 990-PF, PART III, LINE 3	93,140,872.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 8

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U S A TREAS NOTES 0.25% 06/30/2025 DTD 06/30/2020	X		32,428,547.	32,428,547.
U S A TREAS NOTES 0.375% 04/30/2025 DTD 04/30/2020	X		49,969,336.	49,969,336.
U S A TREAS NOTES 0.875% 09/30/2026 DTD 09/30/2021	X		39,788,116.	39,788,116.
U S A TREAS NOTES 1.375% 12/31/2028 DTD 12/31/2021	X		17,546,094.	17,546,094.
U S A TREAS NOTES 1.5% 11/30/2028 DTD 11/30/2021	X		26,534,766.	26,534,766.
TOTAL U.S. GOVERNMENT OBLIGATIONS			166,266,859.	166,266,859.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			166,266,859.	166,266,859.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EDITAS MEDICINE INC	163,797.	163,797.
TOTAL TO FORM 990-PF, PART II, LINE 10B	163,797.	163,797.

## FORM 990-PF

## OTHER INVESTMENTS

## STATEMENT 10

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ABRAMS CAPITAL PARTNERS II, LP	FMV	2,487,185.	2,487,185.
ACACIA PROPERTY CORPORATION 2022	FMV	1,821,321.	1,821,321.
ACE REDPOINT OPPORTUNITY CHINA, LP	FMV	783,774.	783,774.
ACE REDPOINT VENTURES CHINA II, LP	FMV	2,527,509.	2,527,509.
ACE REDPOINT VENTURES CHINA III, LP	FMV	521,015.	521,015.
ACTIVUM SG FEEDER FUND V LP	FMV	7,303,208.	7,303,208.
ALLOCATED AND UNALLOCATED GOLD	FMV	39,164,072.	39,164,072.
ALTAS PARTNERS HOLDINGS (A) LP	FMV	8,586,573.	8,586,573.
ALTAS PARTNERS HOLDINGS II LP	FMV	13,026,492.	13,026,492.
ALTAS PARTNERS HOLDINGS III LP	FMV	1,382,125.	1,382,125.
AMANSA FEEDER, LTD	FMV	34,429,732.	34,429,732.
AMERICAN SECURITIES PARTNERS VI, LP	FMV	6,391,125.	6,391,125.
APH ST. AUGUSTINE HOLDINGS (A) LP	FMV	1,016,626.	1,016,626.
ARROWSTREET CAPITAL GLOBAL EQUITY	FMV		
ALPHA EXTENSION FUND LIMITED		62,014,634.	62,014,634.
ARTEMIS REAL ESTATE PARTNERS FUND II, LP	FMV	1,037,987.	1,037,987.
AXON PARTNERS (OFFSHORE), LTD (F/K/A TPG)	FMV	99,387.	99,387.
BAUPOST VALUE PARTNERS, LP - IV	FMV	8,549,197.	8,549,197.
BOND III, LP	FMV	808,335.	808,335.
BROOKSIDE CAYMAN, LIMITED	FMV	14.	14.
CANTILLON GLOBAL EQUITY LP	FMV	79,441,701.	79,441,701.
CENTERBRIDGE CREDIT PARTNERS TE, LP	FMV	260,765.	260,765.
CYRUS OPPORTUNITIES FUND II, LTD	FMV	10,901,400.	10,901,400.
CYRUS SELECT OPPORTUNITIES FUND, LTD	FMV	16,204,402.	16,204,402.
CYRUS SELECT OPPORTUNITIES MASTER FUND II, LTD	FMV	10,571,301.	10,571,301.
DENHAM COMMODITY PARTNERS FUND VI-A LP	FMV	5,009,937.	5,009,937.
DRAGONEER GLOBAL OFFSHORE FEEDER II, LP	FMV	9,874,557.	9,874,557.
ECHO STREET GOODCO SELECT II, LP	FMV	498,765.	498,765.
ELLIOTT INTERNATIONAL LIMITED	FMV	59,267,225.	59,267,225.
ENCAP ENERGY CAPITAL FUND IX, LP	FMV	1,159,723.	1,159,723.
ENCAP ENERGY CAPITAL FUND VIII-B, LP	FMV	3,194,394.	3,194,394.
ENCAP ENERGY CAPITAL FUND X, LP	FMV	4,599,191.	4,599,191.
ENCAP ENERGY CAPITAL FUND XI, LP	FMV	8,128,305.	8,128,305.
ENCAP FLATROCK MIDSTREAM FUND III, LP	FMV	4,825,791.	4,825,791.
ENCAP FLATROCK MIDSTREAM FUND IV, LP	FMV	4,329,706.	4,329,706.
FARALLON CAPITAL INSTITUTIONAL PARTNERS, LP	FMV	67,851,198.	67,851,198.
FELICIS FOCUS FUND I, LP	FMV	1,219,556.	1,219,556.
FELICIS VENTURES IX, LP	FMV	1,395,343.	1,395,343.
FELICIS VENTURES VII, LP	FMV	4,173,071.	4,173,071.
FELICIS VENTURES VIII, LP	FMV	3,100,222.	3,100,222.
FINEPOINT CAPITAL PARTNERS II, LP	FMV	446,608.	446,608.

FOLIUM AGRICULTURE FUND I PARALLEL-1 LP	FMV	11,681,201.	11,681,201.
FOLIUM TIMBER FUND I PARALLEL-1 LP	FMV	11,150,230.	11,150,230.
FORTRESS CREDIT OPPORTUNITIES FUND (B) LP	FMV	131,715.	131,715.
FPA APARTMENT OPPORTUNITY FUND VI-A, LP	FMV	2,553,936.	2,553,936.
FPA APARTMENT OPPORTUNITY FUND VII-A, LP	FMV	8,077,333.	8,077,333.
FPA APARTMENT OPPORTUNITY FUND VIII-A, LP	FMV	4,277,072.	4,277,072.
FPV FUND I, LP	FMV	1,694,333.	1,694,333.
GA RV (CLASS A) CONTINUATION, LP	FMV	2,003,499.	2,003,499.
GAOLING FEEDER, LTD	FMV	17,303.	17,303.
GARRISON REAL ESTATE FUND III LP	FMV	647,859.	647,859.
GENERAL ATLANTIC INVESTMENT PARTNERS I, LP	FMV	1,439,095.	1,439,095.
GOLDMAN SACHS VINTAGE FUND V (OFFSHORE), LP	FMV	273,798.	273,798.
GOODWATER CAPITAL III, LP	FMV	4,285,186.	4,285,186.
GOODWATER CAPITAL IV, LP	FMV	1,943,850.	1,943,850.
GOODWATER INFINITY II, LP	FMV	2,963,526.	2,963,526.
GSO SPECIAL SITUATIONS OVERSEAS FUND LTD	FMV	51,064.	51,064.
H CAPITAL V, LP	FMV	5,368,598.	5,368,598.
HIGHBROOK INCOME PROPERTY FUND II, LP	FMV	270,214.	270,214.
HIGHBROOK INCOME PROPERTY FUND III, LP	FMV	4,188,266.	4,188,266.
HUNTER POINT CAPITAL INVESTORS (OFFSHORE), LP	FMV	2,615,201.	2,615,201.
ICHIGO JAPAN FUND B	FMV	33,553,905.	33,553,905.
LCP VII (OFFSHORE), LP	FMV	475,507.	475,507.
LERER HIPPEAU SELECT FUND IV, LP	FMV	494,730.	494,730.
LERER HIPPEAU VIII, LP	FMV	684,243.	684,243.
LUMINATE CAPITAL PARTNERS II, LP	FMV	10,557,753.	10,557,753.
LUMINATE CAPITAL PARTNERS III, LP	FMV	7,440,455.	7,440,455.
MENLO SPECIAL OPPORTUNITIES III ACCESS LLC	FMV	1,465,699.	1,465,699.
NEXUS SPECIAL SITUATIONS II, LP	FMV	3,312,705.	3,312,705.
NEXUS SPECIAL SITUATIONS III, LP	FMV	6,413,889.	6,413,889.
NGP NATURAL RESOURCES X, LP	FMV	842,562.	842,562.
NUT TREE DRAWDOWN OFFSHORE FUND, LP	FMV	10,189,755.	10,189,755.
PROVIDENCE STRATEGIC GROWTH II-A LP	FMV	8,056,323.	8,056,323.
PROVIDENCE STRATEGIC GROWTH III-A LP	FMV	9,883,122.	9,883,122.
PROVIDENCE STRATEGIC GROWTH IV LP	FMV	11,316,497.	11,316,497.
PSG V LP	FMV	7,369,466.	7,369,466.
REDWOOD DRAWDOWN OFFSHORE FUND II, LP	FMV	2,266,115.	2,266,115.
RIVA CAPITAL PARTNERS III, LP	FMV	566,888.	566,888.
ROARK CAPITAL PARTNERS IV LP	FMV	8,338,187.	8,338,187.
ROARK CAPITAL PARTNERS V (TE) LP	FMV	9,859,278.	9,859,278.
ROTHWELL VENTURES I, LP	FMV	6,245,644.	6,245,644.
SDC DIGITAL INFRASTRUCTURE OPPORTUNITY FUND II, LP	FMV	15,030,383.	15,030,383.
SDC DIGITAL INFRASTRUCTURE OPPORTUNITY FUND III, LP	FMV	5,423,262.	5,423,262.

PETER G. PETERSON FOUNDATION

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	FMV		
SERENITY INVESTMENT FEEDER FUND LIMITED		11,247,863.	11,247,863.
THE CHILDREN'S INVESTMENT FUND TRIDENT V, LP	FMV	54,206,400.	54,206,400.
WARBURG PINCUS CHINA, LP	FMV	1,429,738.	1,429,738.
WARBURG PINCUS CHINA-SOUTHEAST ASIA II, LP	FMV	6,072,163.	6,072,163.
WARBURG PINCUS FINANCIAL SECTOR, LP	FMV	4,635,956.	4,635,956.
WARBURG PINCUS GLOBAL GROWTH 14, LP	FMV	8,714,982.	8,714,982.
WARBURG PINCUS GLOBAL GROWTH, LP	FMV	3,691,426.	3,691,426.
WARBURG PINCUS PRIVATE EQUITY XII, LP	FMV	10,358,926.	10,358,926.
WELSH, CARSON, ANDERSON & STOWE XI, LP	FMV	7,809,934.	7,809,934.
WHALE ROCK FLAGSHIP FUND LTD	FMV	490,901.	490,901.
WHITE DEER ENERGY LP II	FMV	19,602,879.	19,602,879.
WNDRCO HOLDINGS II LP	FMV	1,357,383.	1,357,383.
		839,940.	839,940.
TOTAL TO FORM 990-PF, PART II, LINE 13		844,281,610.	844,281,610.

FORM 990-PF	OTHER ASSETS		STATEMENT 11
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SOFTWARE/DIGITAL	24,033.	21,168.	21,168.
DIVIDEND/OTHER RECEIVABLE	137,366.	964,031.	964,031.
457(F) PLAN ASSET	303,995.	288,178.	288,178.
PROGRAM RELATED INVESTMENT	9,000,000.	9,000,000.	9,000,000.
PRI INTEREST RECEIVABLE	821,805.	1,325,363.	1,325,363.
TO FORM 990-PF, PART II, LINE 15	10,287,199.	11,598,740.	11,598,740.

FORM 990-PF	OTHER LIABILITIES		STATEMENT 12
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
DEFERRED EXCISE TAX	2,816,289.	3,716,805.	
457(F) PLAN LIABILITY	303,994.	288,178.	
TOTAL TO FORM 990-PF, PART II, LINE 22	3,120,283.	4,004,983.	

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	453,375.	50,037.	0.
LORETTA UCELLI 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	EVP - STRATEGY & COMMUNICATIONS 40.00	243,340.	42,875.	0.
JEFFREY HOLLAND 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VICE PRESIDENT, RESEARCH 40.00	312,787.	51,279.	0.
LAURA GORDON 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VP, COMMUNICATIONS & PUBLIC AFFAIRS 40.00	295,667.	14,288.	0.
MYRA SUNG 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VICE PRESIDENT, PROGRAMS 40.00	269,508.	13,086.	0.
CAROLINE PEARSON 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	EXECUTIVE DIRECTOR, PCH, PHTI 40.00	494,546.	69,521.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VII		2,069,223.	241,086.	0.

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 14

ACTIVITY ONE

FOUNDATION ACTIVITIES - SEE STATEMENT 19 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, RESEARCH PROJECTS AND INITIATIVES RELATED TO THE NATION'S LONG-TERM FISCAL OUTLOOK, HEALTHCARE PERFORMANCE AND FUNCTIONING DEMOCRACY. 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

27,980,930.

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 15

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, HEALTHCARE EFFICIENCY AND AN EFFECTIVE DEMOCRACY FOR THE NEXT GENERATION. THE FOUNDATION PRODUCES INFORMATION ON VARIOUS 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 MILESTONES. THE FOUNDATION ENABLES BROAD DISCOURSE REGARDING ITS CORE PROGRAM AREAS THROUGH ITS WEBSITES AND SOCIAL MEDIA.

EXPENSES

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

10,683,589.

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 16

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

4,143,262.

990-PF

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

STATEMENT 17

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, 2024, \$9,000,000 WAS DRAWN AGAINST THE CREDIT AGREEMENT AND INTEREST OF \$1,325,363 WAS ACCRUED. AS OF MARCH 31, 2024, \$10,325,363 WAS DRAWN AGAINST THE CREDIT AGREEMENT INCLUDING INTEREST. SEE STATEMENT 22 FOR FURTHER DETAILS.

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990-PF

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

STATEMENT 18

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NAME OF AFFILIATED OR RELATED ORGANIZATION

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CIVICA, INC.

DESCRIPTION OF RELATIONSHIP WITH AFFILIATED OR RELATED ORGANIZATION

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

NAME OF AFFILIATED OR RELATED ORGANIZATION

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PETERSON SOLUTIONS FUND

DESCRIPTION OF RELATIONSHIP WITH AFFILIATED OR RELATED ORGANIZATION

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COMMON DIRECTOR

## GENERAL EXPLANATION

STATEMENT 19

## 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. THE FOUNDATION ALSO ENGAGES IN A RANGE OF NONPARTISAN EFFORTS TO STRENGTHEN THE DEMOCRATIC FOUNDATIONS OF THE UNITED STATES AND THE EXCHANGE OF IDEAS THAT IS REQUIRED FOR EFFECTIVE POLICYMAKING.

## GENERAL EXPLANATION

STATEMENT 20

## FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

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

## EXPLANATION:

## 2A: NAME &amp; 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.

## 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

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GENERAL EXPLANATION

STATEMENT 21

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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.

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

## GENERAL EXPLANATION

STATEMENT 22

## 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 03/31/2024 \$1,325,363.00

## 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

\$2,371,719

## DATES OF REPORTS

AUDITED FINANCIAL STATEMENTS AS OF 12/31/2019 DATED 4/20/2020, AS OF 12/31/2020 DATED 10/29/2021, AS OF 12/31/2021 DATED 5/16/2022, AS OF 12/31/2022 DATED 3/24/2023, AND AS OF 12/31/2023 DATED 4/15/2024. GRANTEE REPORTS DATED 4/10/2020, 6/12/2020, 12/14/2021, 6/10/2022, 3/27/2023, 3/5/2024

## 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.