

Department of the Treasury
Internal Revenue Service

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.

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning 04/01, 2018, and ending 03/31, 2019

Name of foundation PETER G. PETERSON FOUNDATION		A Employer identification number 26-0316905
Number and street (or P.O. box number if mail is not delivered to street address) 888-C EIGHTH AVENUE BOX #144	Room/suite	B Telephone number (see instructions) (212) 542-9200
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10019		C If exemption application is pending, check here. <input type="checkbox"/>
G Check all that apply:	<input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change	<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation		D 1. Foreign organizations, check here. <input type="checkbox"/>
<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		2. Foreign organizations meeting the 85% test, check here and attach computation. <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 864,874,008.		E If private foundation status was terminated under section 507(b)(1)(A), check here. <input type="checkbox"/>
J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. <input type="checkbox"/>
<input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)		

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)				
Revenue				
1 Contributions, gifts, grants, etc., received (attach schedule)	200,000.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments	2,474,879.	2,474,879.		
4 Dividends and interest from securities	2,359,465.	13,387,558.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	5,699,110.			
b Gross sales price for all assets on line 6a 133,822,252.				
7 Capital gain net income (from Part IV, line 2)		31,515,768.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less: Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule) ATCH 1	125,304.	1,860,869.		
12 Total. Add lines 1 through 11	10,858,758.	49,239,074.		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.	1,897,569.			1,897,569.
14 Other employee salaries and wages	4,095,222.			4,095,222.
15 Pension plans, employee benefits	1,667,713.			1,667,591.
16a Legal fees (attach schedule) ATCH 2	313,413.			245,608.
b Accounting fees (attach schedule) ATCH 3	181,174.			122,788.
c Other professional fees (attach schedule) [4]	4,180,276.	2,539,155.		1,673,615.
17 Interest				
18 Taxes (attach schedule) (see instructions) [5]	413,393.	399,959.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings	367,909.			316,396.
22 Printing and publications	68,153.			74,437.
23 Other expenses (attach schedule) ATCH 6	4,979,360.	6,645,154.		4,675,543.
24 Total operating and administrative expenses. Add lines 13 through 23.	18,164,182.	9,584,268.		14,768,769.
25 Contributions, gifts, grants paid	31,750,310.			23,915,810.
26 Total expenses and disbursements. Add lines 24 and 25	49,914,492.	9,584,268.	0.	38,684,579.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-39,055,734.			
b Net investment income (if negative, enter -0-)		39,654,806.		
c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash - non-interest-bearing	1,050,789.	955,998.	955,998.
	2	Savings and temporary cash investments	146,727,022.	130,192,395.	130,192,395.
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	1,068,104.	239,458.	239,458.
	10a	Investments - U.S. and state government obligations (attach schedule), . .			
	b	Investments - corporate stock (attach schedule) ATCH 7	60,344,203.	55,875,465.	55,875,465.
	c	Investments - corporate bonds (attach schedule),			
	11	Investments - land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule) ATCH 8	678,217,691.	677,034,015.	677,034,015.
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____ ATCH 9)	588,799.	576,677.	576,677.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	887,996,608.	864,874,008.	864,874,008.	
Liabilities	17	Accounts payable and accrued expenses	1,353,562.	1,600,237.	
	18	Grants payable	10,833,923.	18,668,424.	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons, . .			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____ ATCH 10)	2,791,533.	2,331,207.	
23	Total liabilities (add lines 17 through 22)	14,979,018.	22,599,868.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> X and complete lines 24 through 26, and lines 30 and 31.				
	24	Unrestricted	873,017,590.	842,274,140.	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds . .			
30	Total net assets or fund balances (see instructions)	873,017,590.	842,274,140.		
31	Total liabilities and net assets/fund balances (see instructions)	887,996,608.	864,874,008.		

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 30 (must agree with end-of-year figure reported on prior year's return)	1	873,017,590.
2	Enter amount from Part I, line 27a	2	-39,055,734.
3	Other increases not included in line 2 (itemize) ▶ ATCH 11	3	8,312,284.
4	Add lines 1, 2, and 3	4	842,274,140.
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	842,274,140.

Part IV Capital Gains and Losses for Tax on Investment Income

(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.)
1 a SEE PART IV SCHEDULE						
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						
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.						
(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))			
a						
b						
c						
d						
e						
2	Capital gain net income or (net capital loss) $\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$		2	31,515,768.		
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	0.		

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	36,767,983.	844,607,145.	0.043533
2016	30,480,714.	709,437,813.	0.042965
2015	28,219,297.	612,096,991.	0.046103
2014	27,025,290.	586,785,015.	0.046057
2013	18,345,609.	506,859,321.	0.036195
2	Total of line 1, column (d)		2 0.214853
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years		3 0.042971
4	Enter the net value of noncharitable-use assets for 2018 from Part X, line 5		4 898,817,547.
5	Multiply line 4 by line 3.		5 38,623,089.
6	Enter 1% of net investment income (1% of Part I, line 27b).		6 396,548.
7	Add lines 5 and 6.		7 39,019,637.
8	Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.		8 38,684,579.

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

Table with 11 rows for excise tax calculations. Includes fields for exempt foundations, domestic foundations, tax under section 511, add lines 1 and 2, subtitle A tax, tax based on investment income, credits/payments (6a-6d), total credits, penalty, tax due, overpayment, and amount of line 10 to be credited to 2019 estimated tax.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about influencing legislation, political purposes, Form 1120-POL filing, political expenditures, reimbursement, unreported activities, changes in governing instruments, unrelated business gross income, liquidation, requirements of section 508(e), states reported to, Form 990-PF distribution, private operating foundation status, and substantial contributors.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-16 containing questions about controlled entities, distributions, public inspection requirements, and foreign interests.

Part VII-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.

Table with 3 columns: Question, Yes, No. Rows 1a-4b containing questions about disqualifying acts, taxes on failure to distribute income, and business enterprise interests.

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

5a During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions. **5b** N/A
Organizations relying on a current notice regarding disaster assistance, check here

c 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? Yes No
If "Yes," attach the statement required by Regulations section 53.4945-5(d). N/A

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X
If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** N/A

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? Yes No

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 12		1,897,569.	206,735.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 13		1,019,034.	101,712.	0.

Total number of other employees paid over \$50,000. 29

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ATCH 14		4,691,795.

Total number of others receiving over \$50,000 for professional services 26

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 GRANTS AND GRANT-MAKING - SEE ATTACHMENT 15	33,864,257.
2 EDUCATION, AWARENESS, AND ENGAGEMENT - SEE ATTACHMENT 15	8,264,995.
3 POLICY RESEARCH AND ANALYSIS - SEE ATTACHMENT 15	4,794,514.
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 NONE	
2	
All other program-related investments. See instructions.	
3 NONE	

Total. Add lines 1 through 3 0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	208,494,177.
b	Average of monthly cash balances	1b	49,888,007.
c	Fair market value of all other assets (see instructions).	1c	654,122,940.
d	Total (add lines 1a, b, and c)	1d	912,505,124.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d.	3	912,505,124.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	13,687,577.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	898,817,547.
6	Minimum investment return. Enter 5% of line 5	6	44,940,877.

Part XI 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 X, line 6	1	44,940,877.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	793,096.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	793,096.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	44,147,781.
4	Recoveries of amounts treated as qualifying distributions.	4	47,062.
5	Add lines 3 and 4	5	44,194,843.
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	44,194,843.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26.	1a	38,684,579.
b	Program-related investments - total from Part IX-B.	1b	
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	38,684,579.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	38,684,579.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				44,194,843.
2 Undistributed income, if any, as of the end of 2018:				
a Enter amount for 2017 only.			32,359,384.	
b Total for prior years: 20 <u>16</u> , 20 <u>15</u> , 20 <u>14</u>				
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$ <u>38,684,579.</u>				
a Applied to 2017, but not more than line 2a			32,359,384.	
b Applied to undistributed income of prior years (Election required - see instructions).				
c Treated as distributions out of corpus (Election required - see instructions) <u>EXHIBIT 1</u>	200,000.			
d Applied to 2018 distributable amount.				6,125,195.
e Remaining amount distributed out of corpus.				
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	200,000.			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see instructions				
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instructions				
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019.				38,069,648.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	200,000.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

NOT APPLICABLE

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 2018, 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) 4942(j)(3) or 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV 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).)

N/A

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.

N/A

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

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

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

ATCH 16

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

ATCH 16

c Any submission deadlines:

ATCH 16

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

ATCH 16

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or 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
a Paid during the year ATCH 17				23,915,810.
Total				3a 23,915,810.
b Approved for future payment ATCH 18				14,523,581.
Total				3b 14,523,581.

Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
a Transfers from the reporting foundation to a noncharitable exempt organization of:
(1) Cash
(2) Other assets
b Other transactions:
(1) Sales of assets to a noncharitable exempt organization
(2) Purchases of assets from a noncharitable exempt organization
(3) Rental of facilities, equipment, or other assets
(4) Reimbursement arrangements
(5) Loans or loan guarantees
(6) Performance of services or membership or fundraising solicitations
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation.

Table with 4 columns: (a) Line no., (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements. Row 1 contains 'N/A' for amount and description.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? [] Yes [X] No

Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship. All cells are empty.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.
Sign Here: Signature of Margaret A. Bradshaw, Date 2/13/20, Title TREASURER.
May the IRS discuss this return with the preparer shown below? [X] Yes [] No

Paid Preparer Use Only section containing fields for Print/Type preparer's name (MARGARET A BRADSHAW), Preparer's signature (Margaret A. Bradshaw), Date (02/13/2020), Firm's name (KPMG LLP), Firm's address (8350 BROAD STREET, SUITE 900 MCLEAN, VA 22102), Firm's EIN (13-5565207), and Phone no. (703-286-8000).

**FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		PARTNERSHIP K-1 - SHORT-TERM				P	-283,763.	
		PARTNERSHIP K-1 - LONG-TERM				P	25,466,783.	
123,984,984.		PUBLICLY TRADED SECURITIES - LONG-TERM 118,510,938.					5,474,046.	
632,495.		OTHER SECURITIES				P	632,495.	
1,143.		457(F) CAPITAL GAIN				P	1,143.	
9,203,630.		DISPOSITION OF PARTNERSHIP INTEREST 8,978,566.					225,064.	
TOTAL GAIN(LOSS)							<u>31,515,768.</u>	

Schedule of Contributors

2018

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

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 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (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, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization **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	FORD FOUNDATION 320 E 43RD ST NEW YORK, NY 10017	\$ 200,000.	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.)

Name of organization **PETER G. PETERSON FOUNDATION**

Employer identification number

26-0316905

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
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____

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 information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed.

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

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

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

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

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

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

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

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

FORM 990PF, PART I - OTHER INCOME

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
PARTNERSHIP - ORDINARY TRADE/BUSINESS		21,309.
PARTNERSHIP - ROYALTY INCOME		283,026.
PARTNERSHIP - OTHER PORTFOLIO INCOME		336,264.
PARTNERSHIP - OTHER INCOME		1,219,713.
PARTNERSHIP - CANCELLATION OF DEBT		557.
OTHER INCOME	125,304.	
TOTALS	<u>125,304.</u>	<u>1,860,869.</u>

ATTACHMENT 2

FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
LEGAL FEES	313,413.			245,608.
TOTALS	<u>313,413.</u>			<u>245,608.</u>

ATTACHMENT 3

FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
AUDIT & ACCOUNTING FEES	98,500.			91,500.
PROFESSIONAL TAX FEES	82,674.			31,288.
TOTALS	<u>181,174.</u>			<u>122,788.</u>

ATTACHMENT 4

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>CHARITABLE PURPOSES</u>
COMMUNICATIONS	112,208.		123,447.
INVESTMENT MANAGEMENT	2,539,155.	2,539,155.	
OTHER PROFESSIONAL FEES	361,000.		346,000.
INFORMATION TECHNOLOGY	505,691.		529,337.
HUMAN RESOURCES	662,222.		674,831.
TOTALS	<u>4,180,276.</u>	<u>2,539,155.</u>	<u>1,673,615.</u>

FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
TAX EXPENSES	413,393.	
PARTNERSHIP - FOREIGN TAXES		399,959.
TOTALS	<u>413,393.</u>	<u>399,959.</u>

ATTACHMENT 6

FORM 990PF, PART I - OTHER EXPENSES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
MEDIA SPONSORSHIPS AND ADVERTISING	179,217.			181,985.
OTHER PROGRAM EXPENSES	4,402,313.			4,250,569.
OTHER MISCELLANEOUS EXPENSES	397,830.			242,989.
K-1 OTHER PORTFOLIO DEDUCTIONS		285,465.		
K-1 ADVISORY FEES		343,780.		
K-1 INVESTMENT INTEREST EXP		339,793.		
K-1 OTHER DEDUCTIONS		5,576,749.		
K-1 ROYALTY DEDUCTIONS		99,367.		
TOTALS	<u>4,979,360.</u>	<u>6,645,154.</u>		<u>4,675,543.</u>

ATTACHMENT 7FORM 990PF, PART II - CORPORATE STOCK

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
QUANTA SVCS INC OM		1,268,064.	1,268,064.
FEDEX CORP COM	6,000,349.	4,533,436.	4,533,436.
WHIRLPOOL CORP.	3,674,640.	3,189,360.	3,189,360.
AIRBUS GROUP - UNSPON ADR	7,612,827.	4,924,027.	4,924,027.
CITIGROUP INC	7,087,500.	6,533,100.	6,533,100.
D R HORTON INC	2,725,182.	3,608,336.	3,608,336.
GOLDMAN SACHS GROUP	8,311,380.	6,335,670.	6,335,670.
JPMORGAN CHASE & CO	6,323,275.	5,820,725.	5,820,725.
LENNAR CORP CL A	3,156,944.	2,827,584.	2,827,584.
PULTEGROUP INC COM	2,553,038.	2,420,581.	2,420,581.
TRI POINTE HOMES INC COM	1,839,355.	1,415,061.	1,415,061.
AECOM COM	253,008.	210,687.	210,687.
TOLL BROS INC	549,621.	460,030.	460,030.
LENNAR CORP CL B	51,076.	41,898.	41,898.
ADIANT PLC SHS	1,015,920.	220,320.	220,320.
FORD MOTOR CO DEL COM PAR	1,108,000.	2,786,772.	2,786,772.
TAYLOR MORRISON HOME CORP CL A	931,200.	710,000.	710,000.
GENERAL MTRS CO COM	1,296,598.	6,410,880.	6,410,880.
EDITAS MEDICINE INC	5,854,290.	2,158,934.	2,158,934.
TOTALS	<u>60,344,203.</u>	<u>55,875,465.</u>	<u>55,875,465.</u>

ATTACHMENT 8FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
SILCHESTER INTL INVESTORS	40,635,681.	37,452,765.	37,452,765.
HIGHFIELDS CAPITAL IV LP	17,206,739.	2,714,373.	2,714,373.
FARALLON CAP INST PARTNERS LP	27,430,642.	52,074,505.	52,074,505.
TPG-AXON PARTNERS (OFFSHORE) LTD	98,653.	94,534.	94,534.
ETON PARK OVERSEAS FUND LTD	79,735.	33,407.	33,407.
GSO SPECIAL SITUATIONS OVERSEAS FUND LTD	387,107.	467,714.	467,714.
BROOKSIDE CAYMAN LTD	41,440.	911.	911.
FORTRESS CREDIT OPP. FUND (B) LP	2,945,855.	2,156,861.	2,156,861.
CENTERBRIDGE CREDIT PARTNERS TE, LP	2,083,339.	1,811,949.	1,811,949.
GS VINTAGE FUND V OFFSHORE LP	1,889,607.	1,286,376.	1,286,376.
GENERAL ATLANTIC INVESTMENT PARTNERS I, LP	13,790,474.	9,578,344.	9,578,344.
BAUPOST VALUE PARTNERS LP IV	21,694,375.	22,599,658.	22,599,658.
WELSH CARSON ANDERSON STOWE XI LP	5,185,001.	3,536,423.	3,536,423.
KING STREET CAPITAL LTD	38,483.	5,112.	5,112.
CEDAR ROCK CAPITAL PARTNERS LLC	44,366,860.	26,999,843.	26,999,843.
CYRUS SELECT OPP. FUND LTD	13,688,165.	13,798,527.	13,798,527.
DOUBLELINE TOTAL RETURN BOND FUND	15,458,716.		
ENCAP ENERGY CAP FD IX, LP	3,607,581.	3,603,603.	3,603,603.
LCP VII (OFFSHORE), LP	1,788,817.	1,418,022.	1,418,022.
GOLUB CAPITAL PARTNERS VIII LP	8,978,566.		
WHITE DEER ENERGY LP II	4,698,657.	4,154,421.	4,154,421.
ACACIA CONSERVATION FUND (OFFSHORE), LTD.	40,210,968.	38,228,721.	38,228,721.
JP MORGAN SHORT DURATION BD FD	19,007,428.		
SENATOR GLOBAL OPPORTUNITY			

ATTACHMENT 8 (CONT'D)FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
OFFSHORE FUND LTD	16,801,198.	16,695,726.	16,695,726.
GAOLING FEEDER FUND LTD	297,412.	173,509.	173,509.
ROUTE ONE OFFSHORE FUND, LTD	1,030.		
ELLIOT INTERNATIONAL LIMITED	24,396,131.	24,951,865.	24,951,865.
TRIDENT V LP	2,932,778.	1,994,894.	1,994,894.
ENCAP ENERGY CAPITAL FUND VIII-B, LP	2,778,024.	2,880,032.	2,880,032.
GARRISON REAL ESTATE FD II LP	1,519,883.	650,408.	650,408.
LONE CASCADE LP	30,839,295.	32,016,130.	32,016,130.
RIVA CAPITAL PARTNERS III LP	4,841,062.	4,023,878.	4,023,878.
SFC ENERGY PARTNERS IIB LP	6,767,444.	4,990,265.	4,990,265.
HIGHBROOK INCOME PROPERTY FUND, LP	3,010,763.	1,539,645.	1,539,645.
AMERICAN SECURITIES PARTNERS VI, LP	4,854,187.	4,532,625.	4,532,625.
DENHAM COMMODITY PARTNERS FUND VI-A, LP	7,057,881.	8,045,258.	8,045,258.
ABRAMS CAPITAL PARTNERS II LP	9,838,286.	11,088,454.	11,088,454.
OVERLOOK PARTNERS FUND LP	24,190,354.	23,451,837.	23,451,837.
NGP NATURAL RESOURCES X LP	4,892,645.	3,830,454.	3,830,454.
PASSPORT SPECIAL OPPORTUNITIES FUND, LTD	198,606.	185,071.	185,071.
HIGHBROOK INCOME PROP FD II	6,775,793.	3,037,363.	3,037,363.
CYRUS OPP. FUND II LTD	9,697,881.	9,701,176.	9,701,176.
ANCHORAGE ILLIQUID OPP OFFSHORE IV, LP	3,908,877.	3,112,822.	3,112,822.
GOLD	23,414,256.	22,911,075.	22,911,075.
FINEPOINT CAPITAL PARTNERS II LP	20,701,373.	20,811,610.	20,811,610.
ENCAP FLATROCK MIDSTREAM FUND	3,237,504.	6,997,082.	6,997,082.
GARRISON REAL ESTATE FUND III	5,417,206.	5,194,175.	5,194,175.
ARTEMIS REAL ESTATE PARTNERS FUND II, L.P.	5,069,604.	3,736,857.	3,736,857.

ATTACHMENT 8 (CONT'D)FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
ENCAP ENERGY CAPITAL FUND X, L.P.	5,222,749.	6,434,838.	6,434,838.
COLUMBUS HILL OVERSEAS, LTD.	19,765,810.	18,959,835.	18,959,835.
STEELMILL FUND LTD	20,325,676.	18,155,937.	18,155,937.
WARBURG PINCUS PRIVATE EQUITY XII LP	5,879,962.	8,163,762.	8,163,762.
FPA APARTMENT OPP. FD V-A LP	7,548,870.	3,843,536.	3,843,536.
ROARK CAP PART IV AIV I-B,LP	5,503,017.	5,655,802.	5,655,802.
CANTILLON GLOBAL EQUITY L.P.	39,794,232.	45,045,017.	45,045,017.
PROVIDENCE STRATEGIC GROWTH II	8,280,890.	9,574,529.	9,574,529.
WARBURG PINCUS CHINA FUND, L.P	2,765,992.	5,429,694.	5,429,694.
FOLIUM AGRICULTURE FD I PARALL	3,915,725.	5,846,644.	5,846,644.
FOLIUM TIMBER FD I PARALLEL-1	341,976.	1,371,642.	1,371,642.
ALTAS PARTNERS HOLDINGS (A) LP	1,459,294.	8,448,064.	8,448,064.
VANGUARD INST INDEX-INST	32,166,547.		
ACTIVUM SG FEEDER FD V LP	2,799,463.	5,057,401.	5,057,401.
ENCAP ENERGY CAPITAL FUND XI,	434,688.	890,431.	890,431.
ENCAP FLATROCK MIDSTREAM FD IV	273,998.	2,366,290.	2,366,290.
FPA APARTMENT OPP. FD VI-A LP	736,554.	3,510,127.	3,510,127.
HIGHBROOK INCOME PROP FD III	495,255.	4,047,280.	4,047,280.
NEXUS SPECIAL SITUATIONS II LP	129,748.	1,389,358.	1,389,358.
PROVIDENCE STRAT GROWTH III	30,244.	4,642,687.	4,642,687.
REDWOOD DRAWDOWN OFFSHORE II	580,949.	2,594,060.	2,594,060.
ROARK CAPITAL PARTNERS V (TE)	1,160,505.	1,706,758.	1,706,758.
WARBURG PINCUS FINANCIAL SECTO	1,103,185.	1,329,550.	1,329,550.
ICHIGO JAPAN FUND B	8,750,000.	23,826,923.	23,826,923.
YIHENG CAPITAL OFFSHORE PARTNERS, LTD.		19,312,034.	19,312,034.
AMANSA FEEDER, LTD		9,439,740.	9,439,740.
WARBURG PINCUS GLOBAL GROWTH LP		74,639.	74,639.
LUMINATE CAPITAL PARTNERS II		1,867,638.	1,867,638.
CEPHEI QFII CHINA ABSOLUTE			

ATTACHMENT 8 (CONT'D)

FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
RETURN OFFSHORE FEEDER FD LTD.		18,599,410.	18,599,410.
GOODWATER CAPITAL III, LP		527,465.	527,465.
H CAPITAL V, LP		354,644.	354,644.
TOTALS	<u>678,217,691.</u>	<u>677,034,015.</u>	<u>677,034,015.</u>

ATTACHMENT 9

FORM 990PF, PART II - OTHER ASSETS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
457(F) PLAN ASSET	420,137.	363,326.	363,326.
DIVIDEND/OTHER RECEIVABLES	34,405.	207,107.	207,107.
SOFTWARE/DIGITAL	134,257.	6,244.	6,244.
TOTALS	<u>588,799.</u>	<u>576,677.</u>	<u>576,677.</u>

ATTACHMENT 10FORM 990PF, PART II - OTHER LIABILITIES

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>
DEFERRED EXCISE TAX	2,371,396.	1,967,882.
457(F) PLAN LIABILITY	420,137.	363,325.
TOTALS	<u>2,791,533.</u>	<u>2,331,207.</u>

ATTACHMENT 11FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

<u>DESCRIPTION</u>	<u>AMOUNT</u>
UNREALIZED GAIN ON INVESTMENTS	8,265,124.
RECOVERY OF PRIOR YEAR GRANT	47,160.
TOTAL	<u>8,312,284.</u>

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 12

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
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.
LORETTA UCELLI 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	EXEC VP, STRATEGY & COMM 40.00	435,319.	49,975.	0.
JAY WANT 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	EXECUTIVE DIRECTOR - PCH 40.00	418,298.	50,986.	0.
SUSAN TANAKA 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	SENIOR POLICY ADVISOR 40.00	350,784.	46,339.	0.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 12 (CONT'D)

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
CARRIE HALL 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VP, COMM & PUBLIC AFFAIRS 40.00	259,844.	25,959.	0.
JEFFREY HOLLAND 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	VP, RESEARCH 40.00	242,748.	24,201.	0.
SUK YUN WON 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	CHIEF OPERATING OFFICER 40.00	190,576.	9,275.	0.
	GRAND TOTALS	<u>1,897,569.</u>	<u>206,735.</u>	<u>0.</u>

990PF, PART VIII - COMPENSATION OF THE FIVE HIGHEST PAID EMPLOYEES

ATTACHMENT 13

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
SHAWN DIMANTHA 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	DIRECTOR, PROD DEV 40.00	209,309.	20,917.	0.
MYRA SUNG 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	DIR, COMM & INITIV 40.00	206,069.	20,592.	0.
RUSS LEVSEN 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	DIR, POLICY COMM 40.00	205,228.	20,508.	0.
RIKARD TREIBER 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	DIR, GRANTS MGMT 40.00	201,109.	20,085.	0.
JEFFREY SELBERG 888-C EIGHTH AVENUE BOX #144 NEW YORK, NY 10019	SENIOR ADVISOR - PCH 20.00	197,319.	19,610.	0.
	TOTAL COMPENSATION	<u>1,019,034.</u>	<u>101,712.</u>	<u>0.</u>

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALSATTACHMENT 14

<u>NAME AND ADDRESS</u>	<u>TYPE OF SERVICE</u>	<u>COMPENSATION</u>
EAST END ADVISORS, LLC 610 FIFTH AVENUE, SUITE 506 NEW YORK, NY 10020	INVESTMENT MGMT	1,978,624.
PURPLE STRATEGIES, LLC 815 SLATERS LANE ALEXANDRIA, VA 22314	COMMUNICATIONS	800,000.
PEAKXV, LLC 1332 HERMOSA AVE, SUITE 5 HERMOSA BEACH, CA 90254	COMMUNICATIONS	715,479.
RATIONAL 360 1828 L STREET, NW, SUITE 640 WASHINGTON, DC 20036	COMMUNICATIONS	637,161.
GREENHAVEN ASSOCIATES INC 3 MANHATTANVILLE RD PURCHASE, NY 10577	INVESTMENT MGMT	560,531.
	TOTAL COMPENSATION	<u>4,691,795.</u>

Form 990PF, Part IX-A Summary of Direct Charitable Activities

FOUNDATION ACTIVITIES

The Peter G. Peterson Foundation's mission is to increase public awareness of the nature and urgency of key fiscal challenges threatening America's future, and to accelerate action on them. We work to bring Americans together to find and implement sensible, long-term solutions that transcend age, party lines, and ideological divides. 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.

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. A complete listing of our paid grants in fiscal year 2019 can be found in Attachment 17.

Education, Awareness, and Engagement

The Foundation's education, awareness, and engagement initiatives seek to improve Americans' understanding of our nation's long-term fiscal challenges and provide opportunities to participate in finding solutions. The Foundation produces information on fiscal and economic policy topics for the general public; develops print, television, and digital media advertising; and issues policy research briefs and statements around key milestones. The Foundation enables broad discourse regarding fiscal and economic issues through its websites and social media. In addition, the Foundation convenes an annual Fiscal Summit and other events that bring together policy leaders, experts, and elected officials from across the political and ideological spectrum to discuss fiscal and economic issues.

Policy Research and Analysis

The Foundation produces non-partisan research, analyses, and other data-driven information to help make complex fiscal and economic issues more understandable and meaningful to the public. The Foundation's research and analyses are incorporated into its education, awareness, and engagement activities. This material is made accessible on the Foundation's website and includes: analyses of budget and economic issues; a library of charts and graphs, blog postings, primers and policy research briefs that explain the budget and budget process; and the relationship between the budget, the economy, and demographic trends. The Foundation's research efforts are also reflected in speeches, articles, and presentations.

FORM 990PF, PART XV - SUPPLEMENTARY INFORMATION2a - NAME, ADDRESS, AND TELEPHONE NUMBER OR EMAIL ADDRESS:

INITIAL GRANT INQUIRIES ARE
ACCEPTED VIA EMAIL TO
INQUIRIES@PGPF.ORG

2b - FORM IN WHICH APPLICATION SHOULD BE SUBMITTED:

A BRIEF DESCRIPTION OF THE PROPOSED PROJECT VIA EMAIL, OR THE
"INQUIRIES" LINK ON THE FOUNDATION'S WEBSITE.

2c - 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

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
American Academy of Political and Social Science 202 S. 36th Street Philadelphia, PA 19104	PC - 509(a)(2)	To support research on reform of the major programs in the U.S. entitlement system.	\$80,000
American Action Forum 1747 Pennsylvania Ave. NW, Fifth Floor Washington, DC 20006	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$187,500
American Action Forum 1747 Pennsylvania Ave. NW, Fifth Floor Washington, DC 20006	PC - 509(a)(1)	To support education and outreach on the impact of trade policy, including its effect on economic growth and fiscal sustainability.	\$80,000
American Action Forum 1747 Pennsylvania Ave. NW, Fifth Floor Washington, DC 20006	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500
American Enterprise Institute 1789 Massachusetts Avenue, NW Washington, DC 20036	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$187,500
The Aspen Institute One Dupont Circle, NW, Suite 700 Washington, DC 20036	PC - 509(a)(2)	To support a research project on the future of work, which will identify the challenges for workers in the sharing economy and incentives for traditional businesses to invest more in their workers.	\$50,000
Association for Budgeting and Financial Management University of Central Florida 4364 Scorpius Street, Ste. 238E Orlando, FL 32816	PC - 509(a)(2)	To support the Association for Budgeting and Financial Management Conference.	\$10,000
Beth Israel Deaconess Medical Center* 330 Brookline Avenue Boston, MA 02215	PC - 509(a)(1)	To support the OpenNotes initiative to increase transparency and promote patient engagement, by granting patients access to the clinical notes written by their healthcare providers.	\$150,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Bipartisan Policy Center 1225 Eye Street NW, Suite 1000 Washington, DC 20005	PC - 509(a)(1)	To support independent bipartisan analyses of the sustainability of Social Security and Medicare on behalf of the American public by two former public trustees.	\$200,000
Bipartisan Policy Center 1225 Eye Street NW, Suite 1000 Washington, DC 20005	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$187,500
Bipartisan Policy Center 1225 Eye Street NW, Suite 1000 Washington, DC 20005	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$25,500
Brandeis University* The Heller School PO Box 549110 Waltham, MA 02454	PC - 509(a)(1)	To support the 26th Princeton Conference, which provides healthcare professionals the ability to discuss the most pressing issues in health policy.	\$25,000
The Brookings Institution 1775 Massachusetts Ave, NW Washington, DC 20036	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$118,709
The Brookings Institution 1775 Massachusetts Ave, NW Washington, DC 20036	PC - 509(a)(1)	To support a new version of the budget game The Fiscal Ship, which challenges players to put the federal budget on a sustainable course.	\$38,000
The Brookings Institution 1775 Massachusetts Ave, NW Washington, DC 20036	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500
Brown University* 121 South Main Street Providence, RI 02912	PC - 509(a)(1)	To support a statewide healthcare improvement initiative in Rhode Island.	\$375,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Brown University* 121 South Main Street Providence, RI 02912	PC - 509(a)(1)	To support the identification of effective strategies to improve the quality and lower the cost of healthcare for high-need Medicare patients.	\$360,000
Business Executives for National Security 1030 15th St NW, Suite 200 East Washington, DC 20005	PC - 509(a)(1)	To provide general support.	\$25,000
Camden Coalition of Healthcare Providers* 800 Cooper Street, 7th Floor Camden, NJ 08102	PC - 509(a)(1)	To support the scaling of an advanced preventive care model for chronically ill older adults.	\$640,000
Camden Coalition of Healthcare Providers* 800 Cooper Street, 7th Floor Camden, NJ 08102	PC - 509(a)(1)	To support interactive education on improving healthcare for high-need patients.	\$70,000
Catalyst for Payment Reform Inc.* 1344 Oxford Street Berkeley, CA 94709	PC - 509(a)(1)	To support the adoption of performance-based healthcare purchasing strategies by employers to improve outcomes for workforces and reduce the cost of care.	\$1,067,000
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$187,500
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support research on the economic effects of deficits and debt, and the development of a responsible long-term approach to U.S. fiscal policy.	\$80,000
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support the development of new policy ideas to contain federal and overall healthcare spending and improve the value and efficiency of Medicare and the healthcare system, and advance these ideas through outreach, education, and partnerships with policymakers and stakeholders.	\$60,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support the annual convening of leading policymakers and thought leaders.	\$25,000
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500
Center for Responsive Politics 1300 L Street NW, Suite 200 Washington, DC 20005	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$40,041
Citizens Budget Commission Two Penn Plaza, 5th Floor New York, NY 10121	PC - 509(a)(1)	To provide general support.	\$26,000
Civica, Inc.* 36 South State Street Salt Lake City, UT 84111	NC - 501(c)4	To support the establishment of Civica Rx, a not-for-profit generic drug company formed to address chronic shortages and rising prices of life-saving medications.	\$1,000,000
Clemson University 105 Sikes Hall Clemson, SC 29634	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$37,088
Bill, Hillary, and Chelsea Clinton Foundation 1633 Broadway, 5th Floor New York, NY 10019	PC - 509(a)(1)	To support the execution of Up to Us™, a nationwide non-partisan 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* 1299 Pennsylvania Ave NW, Ste 1175 Washington, DC 20004	PC - 509(a)(1)	To support interactive education on improving healthcare for patients with advanced illness.	\$100,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Colorado State University 601 S. Howes St., Rm 408 Fort Collins, CO 80523	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$36,854
Committee for a Responsible Federal Budget 1900 M Street NW, Ste. 850 Washington, DC 20036	PC - 509(a)(1)	To advance responsible fiscal policy and budget process reform through policy research, outreach, and engagement efforts.	\$1,667,500
Committee for a Responsible Federal Budget 1900 M Street NW, Ste. 850 Washington, DC 20036	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500
Community Catalyst, Inc.* One Federal Street, Fifth Floor Boston, MA 02110	PC - 509(a)(1)	To support a symposium on improving care for high-need patients.	\$17,500
Concord Coalition Corp. 1530 Wilson Blvd., Suite 550 Arlington, VA 22209	PC - 509(a)(2)	To educate the public about the causes and consequences of federal budget deficits and how to build a sound fiscal foundation for economic growth.	\$1,000,000
Conference Board Inc. 1530 Wilson Blvd., Suite 400 Arlington, VA 22209	PC - 509(a)(2)	To support education and outreach to employees on government policy and fiscal issues.	\$10,000
Council for Economic Education 122 East 42nd St., Suite 2600 New York, NY 10168	PC - 509(a)(2)	To support updates and dissemination of the Understanding Fiscal Responsibility curriculum to help high school students understand the facts, significance, and consequences of the nation's fiscal challenges.	\$225,000
Council for Economic Education 122 East 42nd St., Suite 2600 New York, NY 10168	PC - 509(a)(2)	To support the Visionary Awards, which honors leaders in the economic and financial education field.	\$25,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Economic Policy Institute 1225 Eye St. NW, Suite 600 Washington, DC 20005	PC - 509(a)(1)	To support a public education and engagement effort dedicated to fiscal policy.	\$350,000
Economic Policy Institute 1225 Eye St. NW, Suite 600 Washington, DC 20005	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$187,500
Economic Policy Institute 1225 Eye St. NW, Suite 600 Washington, DC 20005	PC - 509(a)(1)	To provide general support.	\$25,000
Economic Policy Institute 1225 Eye St. NW, Suite 600 Washington, DC 20005	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500
Fiscal Challenge 115 Tuckers Pond Drive Chapel Hill, NC 27516	PC - 509(a)(2)	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.	\$20,000
George Washington University 2121 I Street NW Washington, DC 20052	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$37,363
Georgetown University 37th and O Streets, NW Washington, DC 20057	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$44,571
Grantmakers in Aging Inc* 2001 Jefferson Davis Highway, Ste. 1011 Arlington, VA 22202	PC - 509(a)(1)	To provide resources to healthcare foundations across the U.S. on how to improve the quality and lower the cost of care for high-need patients.	\$8,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Harvard University* 1033 Massachusetts Ave., Suite 3 Cambridge, MA 02138	PC - 509(a)(1)	To support the design of a scalable change management solution to reduce hospital overuse in the U.S.	\$535,000
Harvard University* 1033 Massachusetts Ave., Suite 3 Cambridge, MA 02138	PC - 509(a)(1)	To identify policy solutions to address excessive healthcare price increases in markets with limited competition.	\$47,000
Harvard University 1033 Massachusetts Ave., Suite 3 Cambridge, MA 02138	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$12,850
Henry J Kaiser Family Foundation* 185 Berry Street, Suite 2000 San Francisco, CA 94107	PC - 509(a)(1)	To support the expansion of the Peterson-Kaiser Health System Tracker, a resource to monitor performance of the U.S. healthcare system.	\$663,631
Henry J Kaiser Family Foundation 185 Berry Street, Suite 2000 San Francisco, CA 94107	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500
Independent Sector 1602 L Street, NW, Suite 900 Washington, DC 20036-5682	PC - 509(a)(1)	To support a conference convening non-profit leaders to discuss public policy challenges and opportunities facing the non-profit sector.	\$15,000
Institute for Family-Centered Care Inc* 6917 Arlington Road, Suite 309 Bethesda, MD 20814	PC - 509(a)(1)	To support the 8th International Conference on Patient- and Family-Centered Care: Promoting Health Equity and Reducing Disparities.	\$10,000
Institute for Healthcare Improvement* 53 State Street, 19th Floor Cambridge, MA 02109	PC - 509(a)(2)	To expand and 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.	\$71,046

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Institute for Healthcare Improvement* 53 State Street, 19th Floor Cambridge, MA 02109	PC - 509(a)(2)	To support the adoption of evidence-based strategies by Medicare Advantage plans to improve the quality and lower the cost of care for high-need patients.	\$48,000
Institute for Healthcare Improvement* 53 State Street, 19th Floor Cambridge, MA 02109	PC - 509(a)(2)	To support a national event convening healthcare professionals and thought leaders to discuss improvement of the U.S. healthcare system.	\$25,000
Institute for Healthcare Improvement* 53 State Street, 19th Floor Cambridge, MA 02109	PC - 509(a)(2)	To support the Summit on Improving Patient Care.	\$10,000
Institute for Women's Policy Research 1200 18th Street NW, Suite 301 Washington, DC 20036	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$36,456
Joint Center for Political and Economic Studies, Inc. 633 Pennsylvania Ave NW Washington, DC 20004	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$15,200
Manhattan Institute for Policy Research 52 Vanderbilt Ave. New York, NY 10017	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$187,500
Manhattan Institute for Policy Research 52 Vanderbilt Ave. New York, NY 10017	PC - 509(a)(1)	To support the development of recommendations and principles for future bipartisan agreements on fiscal policy by examining the successes and failures of previous budget negotiations.	\$60,000
Mercatus Center George Mason University 3434 Washington Boulevard, 4th Floor Arlington, VA 22201	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
NABE Foundation of the National Association for Business Economics 1920 L St NW, Suite 300 Washington, DC 20036	SO I - 509(a)(3) - Type I	To support a national event convening policymakers and business leaders to discuss fiscal and economic issues.	\$40,000
National Academy of Sciences* 500 Fifth Street, NW Washington, DC 20001	PC - 509(a)(1)	To support healthcare research on high-need patients, in partnership with the Bipartisan Policy Center and Harvard School of Public Health.	\$50,000
National Academy of Social Insurance 1200 New Hampshire Ave. NW, #830 Washington, DC 20036	PC - 509(a)(1)	To support a conference regarding Medicare and Social Security issues.	\$10,000
National Association of Health Data Organizations* 124 South 400 East, Suite 220 Salt Lake City, UT 84111	PC - 509(a)(2)	To support the Health Care Data Summit.	\$5,000
National Bureau of Economic Research, Inc. 1050 Massachusetts Avenue Cambridge, MA 02138	PC - 509(a)(1)	To support a post-doctoral fellowship program on long-term fiscal policy.	\$200,000
National Governors Association Center for Best Practices Hall of the States 444 N. Capitol Street NW, Suite 267 Washington, DC 20001	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$4,500
National Tax Association 529 14th Street, NW, Suite 750 Washington, DC 20045	PC - 509(a)(2)	To support the annual Spring Symposium.	\$10,000
National Tax Association 529 14th Street, NW, Suite 750 Washington, DC 20045	PC - 509(a)(2)	To support the annual Conference on Taxation.	\$10,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Net Impact 1333 Broadway Street, Suite 250 Oakland, CA 94612	PC - 509(a)(1)	To support the execution of Up to Us™, a nationwide non-partisan initiative empowering college students to educate and engage their peers on America's fiscal challenges and the impact on their future.	\$1,994,321
New York University 665 Broadway, Suite 801 New York, NY 10012	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$39,580
Northwestern University* 750 N. Lake Shore Drive Chicago, IL 60611-4579	PC - 509(a)(1)	To support the development of a shared decision making model for high-need patients.	\$364,000
Nuclear Threat Initiative 1776 Eye Street NW, Suite 600 Washington, DC 20006	PC - 509(a)(1)	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.	\$575,000
Nuclear Threat Initiative 1776 Eye Street NW, Suite 600 Washington, DC 20006	PC - 509(a)(1)	To support the fourth edition of the Nuclear Materials Security Index, a benchmarking project of nuclear materials security conditions on a country-by-country basis.	\$200,000
Ohio State University 1960 Kenny Road Columbus, OH 43210	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$22,869
The Panetta Institute for Public Policy 100 Campus Center, Building 86E CSU Monterey Bay Seaside, CA 93955	PC - 509(a)(1)	To support the Jefferson-Lincoln Awards.	\$15,000
Peter G. Peterson Institute for International Economics 1750 Massachusetts Avenue, NW Washington, DC 20036-1903	PC - 509(a)(1)	To support and enhance strategic communications and outreach capabilities.	\$6,000,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Peter G. Peterson Institute for International Economics 1750 Massachusetts Avenue, NW Washington, DC 20036-1903	PC - 509(a)(1)	To support non-partisan research and analysis on global and domestic fiscal and economic policy.	\$500,000
Peter G. Peterson Institute for International Economics 1750 Massachusetts Avenue, NW Washington, DC 20036-1903	PC - 509(a)(1)	To support strategic communications and development activities.	\$92,500
Progressive Policy Institute 1200 New Hampshire Ave. NW, Ste. 575 Washington, DC 20036	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$187,500
Progressive Policy Institute 1200 New Hampshire Ave. NW, Ste. 575 Washington, DC 20036	PC - 509(a)(1)	To support policy research and outreach relating to fiscal sustainability.	\$125,000
Project HOPE* 7500 Old Georgetown Road, Suite 600 Bethesda, MD 20814	PC - 509(a)(1)	To support <i>Health Affairs</i> in publishing dedicated content on spreading and scaling value-improving healthcare practices.	\$150,000
RAND Corporation 1776 Main Street Santa Monica, CA 90401-3208	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$77,889
The Regents of the University of California University of California, Berkeley 2195 Hearst Avenue, Room 130F Berkeley, CA 94720-1103	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$12,925
The Regents of the University of Colorado 3100 Marine Street, Room 479 Boulder, CO 80303-1058	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$23,500

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
The Regents of the University of Michigan 3003 South State Street Ann Arbor, MI 48109	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$26,686
Research Foundation of State University of New York PO Box 9 Albany, NY 12201	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$15,782
Rhodes College 2000 North Parkway Memphis, TN 38112	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$25,999
Southern Methodist University PO Box 750240 Dallas, TX 75275	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$9,863
Stanford University* 3172 Porter Drive Palo Alto, CA 94304	PC - 509(a)(1)	To support the Stanford Clinical Excellence Research Center's efforts to identify care delivery innovations that improve quality and reduce costs for high-need patients.	\$175,000
Trustees of Boston College 140 Commonwealth Ave. Chestnut Hill, MA 02467	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$71,774
Trustees of Columbia University in the City of New York 33 West 60th Street, 7th Floor New York, NY 10023	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$36,967
Trustees of Dartmouth College* 11 Rope Ferry Road, #6210 Hanover, NH 03755	PC - 509(a)(1)	To support the Dartmouth Institute for Health Policy & Clinical Practice to identify strategies that Accountable Care Organizations use to deliver high quality care at a lower cost for high-need patients.	\$20,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Trustees of Tufts College 136 Harrison Avenue Boston, MA 02111	PC - 509(a)(1)	To produce and disseminate non-partisan analyses by leading economists on timely fiscal and economic issues.	\$24,000
University of Southern California 3720 S. Flower Street Los Angeles, CA 90089	PC - 509(a)(2)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$40,159
University of Washington 4333 Brooklyn Ave NE Seattle, WA 98195	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$36,215
University of Washington Foundation* 407 Gerberding Hall, Box 351210 Seattle, WA 98195-1210	PC - 509(a)(1)	To support research on the drivers of US health expenditure, and the development of models to forecast future healthcare spending.	\$66,926
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support Tax Policy Center's quantitative analysis of tax expenditures and explanation of the associated policy issues.	\$270,000
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$187,444
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support the development and analysis of new fiscal measurements to improve the understanding of America's fiscal outlook.	\$125,000
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support technical improvements to the Tax Policy Center's models and expanded capacity for analyzing macroeconomic effects of tax reform and the effectiveness of tax policy.	\$100,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support Kids' Share, a project measuring spending on children in the federal budget.	\$75,000
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$ 4,500
The Volcker Alliance 560 Lexington Ave., Suite 16B New York, NY 10022	PC - 509(a)(1)	To produce an annual budget scorecard to promote fiscal transparency and integrity in state governments.	\$350,000
Williams College 24 Hopkins Hall Drive Williamstown, MA 01267	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$ 40,102
Yale University PO Box 2038 New Haven, CT 06521	PC - 509(a)(1)	To support the Yale Program on Financial Stability's development of fiscal, monetary, and regulatory measures to aid in the prevention, management, and resolution of financial crises.	\$400,000
Total Grants Paid in FY19			\$23,915,810

** Grants made from the Peterson Center on Healthcare LLC, which is a wholly owned subsidiary of the Peter G. Peterson Foundation*

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
American Academy of Political and Social Science 202 S. 36th Street Philadelphia, PA 19104	PC - 509(a)(2)	To support research on reform of the major programs in the U.S. entitlement system.	\$15,000
American Action Forum 1747 Pennsylvania Ave. NW, Fifth Floor Washington, DC 20006	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$62,500
American Action Forum 1747 Pennsylvania Ave. NW, Fifth Floor Washington, DC 20006	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
American Enterprise Institute 1789 Massachusetts Avenue, NW Washington, DC 20036	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$62,500
Bipartisan Policy Center 1225 Eye Street NW, Suite 1000 Washington, DC 20005	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$62,500
Bipartisan Policy Center 1225 Eye Street NW, Suite 1000 Washington, DC 20005	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$18,000
The Brookings Institution 1775 Massachusetts Ave, NW Washington, DC 20036	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$13,258
The Brookings Institution 1775 Massachusetts Ave, NW Washington, DC 20036	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Brown University* 121 South Main Street Providence, RI 02912	PC - 509(a)(1)	To support a statewide healthcare improvement initiative in Rhode Island.	\$175,000
Camden Coalition of Healthcare Providers* 800 Cooper Street, 7th Floor Camden, NJ 08102	PC - 509(a)(1)	To support the scaling of an advanced preventive care model for chronically ill older adults.	\$116,000
Camden Coalition of Healthcare Providers* 800 Cooper Street, 7th Floor Camden, NJ 08102	PC - 509(a)(1)	To support interactive education on improving healthcare for high-need patients.	\$30,000
Catalyst for Payment Reform Inc.* 1344 Oxford Street Berkeley, CA 94709	PC - 509(a)(1)	To support the adoption of performance-based healthcare purchasing strategies by employers to improve outcomes for workforces and reduce the cost of care.	\$1,825,000
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support research on the economic effects of deficits and debt, and the development of a responsible long-term approach to U.S. fiscal policy.	\$195,000
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$62,500
Center for American Progress 1333 H Street, NW, 10th Floor Washington, DC 20005	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
Center for Responsive Politics 1300 L Street NW, Suite 200 Washington, DC 20005	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$14,959

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Center for Strategic & International Studies 1616 Rhode Island Ave. NW Washington, DC 20036	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
Clemson University 105 Sikes Hall Clemson, SC 29634	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$12,912
Colorado State University 601 S. Howes St., Rm 408 Fort Collins, CO 80523	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$15,146
Committee for a Responsible Federal Budget 1900 M Street NW, Ste. 850 Washington, DC 20036	PC - 509(a)(1)	To advance responsible fiscal policy and budget process reform through policy research, outreach, and engagement efforts.	\$3,100,000
Committee for a Responsible Federal Budget 1900 M Street NW, Ste. 850 Washington, DC 20036	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
Conference Board Inc. 1530 Wilson Blvd., Suite 400 Arlington, VA 22209	PC - 509(a)(2)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
Economic Policy Institute 1225 Eye St. NW, Suite 600 Washington, DC 20005	PC - 509(a)(1)	To support a public education and engagement effort dedicated to fiscal policy.	\$200,000
Economic Policy Institute 1225 Eye St. NW, Suite 600 Washington, DC 20005	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$62,500

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Economic Policy Institute 1225 Eye St. NW, Suite 600 Washington, DC 20005	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
Fiscal Challenge 115 Tuckers Pond Drive Chapel Hill, NC 27516	PC - 509(a)(2)	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.	\$8,000
George Washington University 2121 I Street NW Washington, DC 20052	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$12,637
Georgetown University 37th and O Streets, NW Washington, DC 20057	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$15,429
Grantmakers in Aging Inc* 2001 Jefferson Davis Highway, Ste. 1011 Arlington, VA 22202	PC - 509(a)(1)	To provide resources to healthcare foundations across the U.S. on how to improve the quality and lower the cost of care for high-need patients.	\$12,000
Harvard University* 1033 Massachusetts Ave., Suite 3 Cambridge, MA 02138	PC - 509(a)(1)	To identify policy solutions to address excessive healthcare price increases in markets with limited competition.	\$188,000
Harvard University 1033 Massachusetts Ave., Suite 3 Cambridge, MA 02138	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$47,150
Henry J Kaiser Family Foundation* 185 Berry Street, Suite 2000 San Francisco, CA 94107	PC - 509(a)(1)	To support the expansion of the Peterson-Kaiser Health System Tracker, a resource to monitor performance of the U.S. healthcare system.	\$1,139,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Henry J Kaiser Family Foundation 185 Berry Street, Suite 2000 San Francisco, CA 94107	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
Institute for Healthcare Improvement* 53 State Street, 19th Floor Cambridge, MA 02109	PC - 509(a)(2)	To support the adoption of evidence-based strategies by Medicare Advantage plans to improve the quality and lower the cost of care for high-need patients.	\$72,000
Institute for Healthcare Improvement* 53 State Street, 19th Floor Cambridge, MA 02109	PC - 509(a)(2)	To expand and 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.	\$57,000
Institute for Women's Policy Research 1200 18th Street NW, Suite 301 Washington, DC 20036	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$13,544
Joint Center for Political and Economic Studies, Inc. 633 Pennsylvania Ave NW Washington, DC 20004	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$46,800
Manhattan Institute for Policy Research 52 Vanderbilt Ave. New York, NY 10017	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$62,500
Manhattan Institute for Policy Research 52 Vanderbilt Ave. New York, NY 10017	PC - 509(a)(1)	To support the development of recommendations and principles for future bipartisan agreements on fiscal policy by examining the successes and failures of previous budget negotiations.	\$39,000
Manhattan Institute for Policy Research 52 Vanderbilt Ave. New York, NY 10017	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Mercatus Center George Mason University 3434 Washington Boulevard, 4th Floor Arlington, VA 22201	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
National Governors Association Center for Best Practices Hall of the States 444 N. Capitol Street NW, Suite 267 Washington, DC 20001	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
Net Impact 1333 Broadway Street, Suite 250 Oakland, CA 94612	PC - 509(a)(1)	To support the execution of Up to Us™, a nationwide non-partisan initiative empowering college students to educate and engage their peers on America's fiscal challenges and the impact on their future.	\$450,000
New York University 665 Broadway, Suite 801 New York, NY 10012	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$17,420
Northwestern University* 750 N. Lake Shore Drive Chicago, IL 60611-4579	PC - 509(a)(1)	To support the development of a shared decision making model for high-need patients.	\$1,861,000
Nuclear Threat Initiative 1776 Eye Street NW, Suite 600 Washington, DC 20006	PC - 509(a)(1)	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.	\$2,425,000
Ohio State University 1960 Kenny Road Columbus, OH 43210	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$24,131
Progressive Policy Institute 1200 New Hampshire Ave. NW, Ste. 575 Washington, DC 20036	PC - 509(a)(1)	To support the development of comprehensive and specific solutions to address the nation's long-term fiscal challenges, as part of the Peter G. Peterson Foundation Solutions Initiative.	\$62,500

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Progressive Policy Institute 1200 New Hampshire Ave. NW, Ste. 575 Washington, DC 20036	PC - 509(a)(1)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000
RAND Corporation 1776 Main Street Santa Monica, CA 90401-3208	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$28,111
The Regents of the University of California University of California, Berkeley 2195 Hearst Avenue, Room 130F Berkeley, CA 94720-1103	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$16,075
The Regents of the University of Colorado 3100 Marine Street, Room 479 Boulder, CO 80303-1058	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$26,500
Regents of the University of Michigan 3003 South State Street Ann Arbor, MI 48109	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$29,314
Research Foundation of State University of New York PO Box 9 Albany, NY 12201	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$19,218
Rhodes College 2000 North Parkway Memphis, TN 38112	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$10,001
Southern Methodist University PO Box 750240 Dallas, TX 75275	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$31,137

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
Trustees of Boston College 140 Commonwealth Ave. Chestnut Hill, MA 02467	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$25,226
Trustees of Columbia University in the City of New York 33 West 60th Street, 7th Floor New York, NY 10023	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$15,033
Trustees of Tufts College 136 Harrison Avenue Boston, MA 02111	PC - 509(a)(1)	To produce and disseminate non-partisan analyses by leading economists on timely fiscal and economic issues.	\$96,000
University of Southern California 3720 S. Flower Street Los Angeles, CA 90089	PC - 509(a)(2)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$16,841
University of Washington 4333 Brooklyn Ave NE Seattle, WA 98195	GOV - Government or Instrumentality	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$12,785
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support Tax Policy Center's quantitative analysis of tax expenditures and explanation of the associated policy issues.	\$606,000
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$65,556
Urban Institute 500 L'Enfant Plaza SW Washington, DC 20024	PC - 509(a)(2)	To support the Peter G. Peterson Foundation Fiscal Internship Program.	\$5,000

<u>Recipient Name and Address</u>	<u>Foundation Status</u>	<u>Purpose of Grant or Contribution</u>	<u>Amount</u>
The Volcker Alliance 560 Lexington Ave., Suite 16B New York, NY 10022	PC - 509(a)(1)	To produce an annual budget scorecard to promote fiscal transparency and integrity in state governments.	\$850,000
Williams College 24 Hopkins Hall Drive Williamstown, MA 01267	PC - 509(a)(1)	To support the US 2050 project, which explores demographic, fiscal, and socioeconomic trends that will shape the U.S. in the decades ahead.	\$14,898
Total FY19 Payables			\$14,523,581

** Grants made from the Peterson Center on Healthcare LLC, which is a wholly owned subsidiary of the Peter G. Peterson Foundation*

PETER G. PETERSON FOUNDATION
EIN: 26-0316905
03/31/19

**ELECTION UNDER REGULATIONS SECTION
53.4942(A)-3(D)(2) TO TREAT
EXCESS QUALIFYING DISTRIBUTIONS
AS DISTRIBUTION OUT OF CORPUS**

AS TO THE TREATMENT OF QUALIFYING DISTRIBUTIONS PURSUANT TO IRC SECTION 4942(H)(2) AND REGULATION 53.4942(A)-3(D)(2), PETER G. PETERSON FOUNDATION HEREBY ELECTS TO TREAT \$200,000 OF TOTAL CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE OUT OF CORPUS.

SIGNED: 

DATE: 2/13/20

NAME AND TITLE: MICHAEL SHANKMAN, TREASURER