

For calendar year 2021, or tax year beginning 01-01-2021, and ending 12-31-2021

Name of foundation JONATHAN LOGAN FAMILY FOUNDATION		A Employer identification number 47-2268391	
Number and street (or P.O. box number if mail is not delivered to street address) 6114 OCEAN VIEW DR	Room/suite	B Telephone number (see instructions) (510) 540-7774	
City or town, state or province, country, and ZIP or foreign postal code OAKLAND, CA 94618		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 106,499,072	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	236	236		
	4 Dividends and interest from securities . . .	2,732	2,732		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	5,358,168			
	b Gross sales price for all assets on line 6a 12,972,361				
	7 Capital gain net income (from Part IV, line 2) . . .		5,358,168		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	5,361,136	5,361,136	0	
	13 Compensation of officers, directors, trustees, etc.	152,225	38,056	0	114,169
	14 Other employee salaries and wages	319,256	79,814	0	239,442
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	1,638	409	0	1,229
	b Accounting fees (attach schedule)	59,700	29,850	0	29,850
	c Other professional fees (attach schedule)	30,765	0	0	30,765
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	50,150	0	0	150
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	16,204	0	0	16,204
	22 Printing and publications				
	23 Other expenses (attach schedule)	234,251	147,066	0	87,185
	24 Total operating and administrative expenses. Add lines 13 through 23	864,189	295,195	0	518,994
	25 Contributions, gifts, grants paid	10,046,636			10,046,636
	26 Total expenses and disbursements. Add lines 24 and 25	10,910,825	295,195	0	10,565,630
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-5,549,689			
	b Net investment income (if negative, enter -0-)		5,065,941		
	c Adjusted net income (if negative, enter -0-)			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		67,314	285,924	285,924
	2	Savings and temporary cash investments		1,508,493	1,371,195	1,371,195
	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				
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)		32,711,648	28,488,489	104,841,953
	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)				
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		34,287,455	30,145,608	106,499,072	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	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 ▶ _____)		7,645	8,402	
	23	Total liabilities (add lines 17 through 22).		7,645	8,402	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds		0	0	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund		0	0	
	28	Retained earnings, accumulated income, endowment, or other funds		34,279,810	30,137,206	
	29	Total net assets or fund balances (see instructions)		34,279,810	30,137,206	
30	Total liabilities and net assets/fund balances (see instructions) .		34,287,455	30,145,608		

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1 34,279,810
2	Enter amount from Part I, line 27a	2 -5,549,689
3	Other increases not included in line 2 (itemize) ▶ _____	3 1,407,085
4	Add lines 1, 2, and 3	4 30,137,206
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6 30,137,206

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES		2015-04-10	2021-12-31
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 12,972,361		7,614,193	5,358,168
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			5,358,168
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	5,358,168
	3	0
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		

Part V

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

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter

Bracket for line 1a

"N/A" on line 1.

1a

Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)

All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)

b

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

2

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6

Credits/Payments:

a

2021 estimated tax payments and 2020 overpayment credited to 2021

6a

80,665

b

Exempt foreign organizations—tax withheld at source

6b

0

c

Tax paid with application for extension of time to file (Form 8868)

6c

575,000

d

Backup withholding erroneously withheld

6d

0

7

Total credits and payments. Add lines 6a through 6d

7

655,665

8

Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached. 

8

0

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

9

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.

10

585,248

11

Enter the amount of line 10 to be: Credited to 2022 estimated tax Refunded

11

0

Part VI-A

Statements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

Yes

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.

1b

No

c

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1c

No

d

Did the foundation file Form 1120-POL for this year?.

1c

No

e

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0 (2) On foundation managers. ☐ \$ 0

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?

2

No

3

If "Yes," attach a detailed description of the activities.

3

No

4a

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes

4a

No

b

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4b

No

5

If "Yes\$," has it filed a tax return on Form 990-T for this year?

5

No

6

Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.

6

No

7

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

7

No

8a

Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV.

8a

No

8b

Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ CA

8b

No

9

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .

9

No

10

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2021 or the taxable year beginning in 2021? See the instructions for Part XIII. If "Yes," complete Part XIII

10

No

11

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

11

No

Part VI-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► JONATHANLOGANFAMILYFOUNDATION.ORG	13	Yes	
14	The books are in care of ► JONATHAN LOGAN Telephone no. ► (510) 540-7774 Located at ► 6114 OCEAN VIEW DRIVE OAKLAND CA ZIP+4 ► 94618			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2021, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign				

Part VI-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	Yes	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)		No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
c	Organizations relying on a current notice regarding disaster assistance check here.			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2021?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2021, did the foundation have any undistributed income (lines 6d and 6e, Part XII) for tax year(s) beginning before 2021? If "Yes," list the years ► 20____, 20____, 20____, 20____	2a		No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a		No
b	If "Yes," did it have excess business holdings in 2021 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2021.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2021?	4b		No

Part VI-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))?

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

(3) Provide a grant to an individual for travel, study, or other similar purposes?

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

b

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

c

Organizations relying on a current notice regarding disaster assistance check here

d

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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?

b

If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

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 during the year?

Yes

No

5a(1)

No

5a(2)

No

5a(3)

No

5a(4)

No

5a(5)

No

5b

5d

6a

No

6b

No

7a

No

7b

8

No

Part VII

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

1

List all officers, directors, trustees, 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
JONATHAN C LOGAN 6114 OCEAN VIEW DRIVE OAKLAND, CA 94618	DIRECTOR, PRESIDENT, CEO 40.00	0	0	0
SUSANNE KARIN ZUERBIG 825 MIRAMAR AVE BERKELEY, CA 94707	TREASURER, DIRECTOR OF OPERATIONS 30.00	152,225	14,021	0
STEWART OWEN 15D SIGNAL HILL ROAD MADISON, CT 06443	SECRETARY 1.00	0	0	0
LILY WOODWARD-LOGAN 5111 DENNY AVE APT 1 NORTH HOLLYWOOD, CA 91601	DIRECTOR 1.00	0	0	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
BARBARA RAAB 470 WEST 24TH STREET 15E NEW YORK, NY 10011	EMPLOYEE 40.00	209,984	5,000	0
THERESA BOYLAN 927 SUNNYHILLS RD OAKLAND, CA 94610	EMPLOYEE 40.00	94,292	14,021	0
Total number of other employees paid over \$50,000.				0

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Part VII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SOUTH LAKEVIEW LLC	INVESTMENT	125,000
2635 SOUTH ST PAUL STREET DENVER,CO 80210		
RSM US LLP	ACCOUNTING AND TAX	59,700
30 SOUTH WACKER DR SUITE 3300 CHICAGO,IL 60606		

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

0

Part VIII- 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 EXHIBITION AND FILM, "THEN THEY CAME FOR ME", REGARDING AMERICA'S TREATMENT OF JAPANESE AMERICANS DURING WWII.	1,134
2	
3	
4	

Part VIII- 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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	98,442,380
b	Average of monthly cash balances.	1b	1,394,682
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	99,837,062
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	99,837,062
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	1,497,556
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	98,339,506
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	4,916,975

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

1	Minimum investment return from Part IX, line 6.	1	4,916,975
2a	Tax on investment income for 2021 from Part V, line 5.	2a	70,417
b	Income tax for 2021. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	70,417
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	4,846,558
4	Recoveries of amounts treated as qualifying distributions.	4	121,000
5	Add lines 3 and 4.	5	4,967,558
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	4,967,558

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	
b	Program-related investments—total from Part VIII-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 XII, line 4.	4	

Part XII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				4,967,558
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2021:				
a From 2016.	2,346,400			
b From 2017.	2,029,868			
c From 2018.	4,639,542			
d From 2019.	6,911,931			
e From 2020.	5,906,096			
f Total of lines 3a through e.	21,833,837			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ \$ 10,565,630				
a Applied to 2020, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2021 distributable amount				4,967,558
e Remaining amount distributed out of corpus	5,598,072			
5 Excess distributions carryover applied to 2021. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	27,431,909			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
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		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022				0
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).	0			
8 Excess distributions carryover from 2016 not applied on line 5 or line 7 (see instructions)	2,346,400			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a	25,085,509			
10 Analysis of line 9:				
a Excess from 2017	2,029,868			
b Excess from 2018	4,639,542			
c Excess from 2019.	6,911,931			
d Excess from 2020	5,906,096			
e Excess from 2021	5,598,072			

Part

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALLIANCE FOR YOUTH ORGANIZING 915 5TH STREET NW WASHINGTON,DC 20001	N/A	P C	GENERAL OPERATING	200,000
ARHOOLIE FOUNDATION 10341 SAN PABLO AVENUE EL CERRITO,CA 94530	N/A	P C	GENERAL OPERATING AND THE DOCUMENTARY FILM "THE NINE LIVES OF BARBARA DANE"	275,000
BERKELEY FILM FOUNDATION 260 10TH STREET SUITE 427 BERKELEY,CA 94710	N/A	P C	ELEVATE GRANT FOR EMERGING FILMMAKER OVER 5 YEARS	30,000
BERKELEY REPERTORY THEATRE 999 HARRISON ST BERKELEY,CA 94710	N/A	P C	GENERAL OPERATING	60,000
BLACK VOTERS MATTER CAPACITY BUILDING INSTITUTE 4157 BEST ROAD SUITE 490 ATLANTA,GA 30349	N/A	P C	GENERAL OPERATING	100,000
CAREY INSTITUTE FOR GLOBAL GOOD 63 HUYCK ROAD RENSSELAEVILLE,NY 12147	N/A	P C	LOGAN NONFICTION PROGRAM	528,000
CARTER CENTER 453 JOHN LEWIS FREEDOM PARKWAY NE ATLANTA,GA 30307	N/A	P C	FOR THE BENJAMIN VON STERNENFELS ROSENTHAL GRANT FOR MENTAL HEALTH INVESTIGATIVE JOURNALISM	10,000
CENTER FOR INDEPENDENT LIVING 3075 ADELINE STREET 100 BERKELEY,CA 94703	N/A	P C	FOR THE DOCUMENTARY FILM "ZONA ROBERTS: INDEPENDENT WOMAN"	25,000
CENTER OF INVESTIGATIVE REPORTING (REVEAL) 1400 65TH STREETSUITE 200 EMERYVILLE,CA 94608	N/A	P C	GENERAL OPERATING	100,000
CHICKEN AND EGG PICTURES 45 MAIN STREET 506 BROOKLYN,NY 11201	N/A	P C	GENERAL OPERATING	200,000
CLAREMONT ELMWOOD NEIGHBORHOOD ASSOCIATION PO BOX 5108 BERKELEY,CA 94705	N/A	P C	GENERAL OPERATING	10,000
CULTURAL RESEARCH AND COMMUNICATION INC 2721 SHATTUCK AVE 1006 BERKELEY,CA 94705	N/A	P C	OUTREACH FOR DOCUMENTARY "NO STRAIGHT LINES"	10,000
DEMOCRACY NORTH CAROLINA 3000 AERIAL CENTER PARKWAY SUITE 160 MORRISVILLE,NC 27560	N/A	P C	GENERAL OPERATING	200,000
DENVER FILM SOCIETY 2510 EAST COLFAX AVE DENVER,CO 80206	N/A	P C	FOR THE DOCUMENTARY FILM "I WAS BORN THIS WAY"	15,000
FIRELIGHT MEDIA 72 HAMILTON TERRACE NEW YORK,NY 10031	N/A	P C	WILLIAM GREAVES FUND FOR MID-CAREER FILMMAKERS OF COLOR	125,000
FIRST AMENDMENT COALITION 534 FOURTH STREET SUITE B SAN RAFAEL,CA 94901	N/A	P C	CAPACITY BUILDING AND GENERAL OPERATING	200,000
FUND FOR INVESTIGATIVE JOURNALISM 110 VERMONT AVE NW SUITE 500 WASHINGTON,DC 20005	N/A	P C	GENERAL OPERATING	80,000
HOWARD UNIVERSITY 2400 SIXTH STREET NW WASHINGTON,DC 20059	N/A	P C	DIGITIZATION OF THE BLACK PRESS ARCHIVES, AS PART OF THE CENTER FOR DEMOCRACY AND JOURNALISM	557,000
INSTITUTE FOR NONPROFIT NEWS PO BOX 8606 CALABASAS,CA 91372	N/A	P C	THE WAR HORSE - DIRECTOR OF DEVELOPMENT 2 YEARS	275,000
INTERNATIONAL CONSORTIUM OF INVESTIGATIVE JOURNALISTS 1710 RHODE ISLAND AVE NW 11TH FLOOR WASHINGTON,DC 20036	N/A	P C	GENERAL OPERATING	500,000
INTERNATIONAL DOCUMENTARY ASSOCIATION 3470 WILSHIRE BLVD SUITE 980	N/A	P C	FOR THE DOCUMENTARY FILM "RUN WITH IT"	25,000

LOS ANGELES,CA 90010				
INTERNATIONAL FUND FOR PHOTOGRAPHY 55 VIA FARALLON ORINDA,CA 94563	N/A	P C	BOOK "COURSE OF THE EMPIRE"	15,000
INVESTIGATIVE REPORTERS AND EDITORS 141 NEFF ANNEX MISSOURI SCHOOL OF JOURNALISM COLUMBIA,MO 65211	N/A	P C	GENERAL OPERATING	75,000
INVISIBLE INSTITUTE 6100 S BLACKSTONE AVE CHICAGO,IL 60637	N/A	P C	ORGANIZATIONAL DEVELOPMENT	125,000
KOVNO COMMUNICATIONS INC 2600 TENTH STREET BERKELEY,CA 94710	N/A	P C	OUTREACH FOR DOCUMENTARY STAY WOKE: BARBARA SPEAKS FOR ME	96,000
LITTLE VILLAGE FOUNDATION 606 ALAMO PINTADO ROAD SUITE 3-225 SOLVANG,CA 93463	N/A	P C	GENERAL OPERATING	50,000
LOS CENZONTLES 13108 SAN PABLO AVENUE SAN PABLO,CA 94805	N/A	P C	SUPPORT FOR OUTREACH ASSOCIATE POSITION, ARTISTIC PERSONNEL AND TECH/AUDIO/VISUAL CONTRACTORS	100,000
MAKING GAY HISTORY 357 WEST 20TH STREET APT A NEW YORK,NY 10011	N/A	P C	PODCAST "MAKING GAY HISTORY"	75,000
MI FAMILIA VOTA EDUCATION FUND 1140 E WASHINGTON ST BUILDING C SUITE 206 PHOENIX,AZ 85034	N/A	P C	NONPARTISAN VOTING RIGHTS AND REDISTRICTING WORK	200,000
NATIONAL DISABILITY RIGHTS NETWORK 820 FIRST STREET NE SUITE 740 WASHINGTON,DC 20002	N/A	P C	NONPARTISAN VOTER ACCESS AND EDUCATION WORK	100,000
NEO PHILANTHROPY 45 W 36TH STREET NEW YORK,NY 10018	N/A	P C	FOR THE STATE INFRASTRUCTURE FUND	500,000
NEW FLORIDA MAJORITY EDUCATION FUND 10800 BISCAYNE BLVD SUITE 1050 MIAMI,FL 33161	N/A	P C	TO EXPAND DEMOCRACY AND VOTER ENGAGEMENT IN FLORIDA	300,000
NEW GEORGIA PROJECT 165 COURTLAND STREET SUITE A231 ATLANTA,GA 30303	N/A	P C	GENERAL OPERATING	200,000
NEW VENTURE FUND 1201 CONNECTICUT AVE NW SUITE 300 WASHINGTON,DC 20036	N/A	P C	FOR THE CENTER FOR SECURE AND MODERN ELECTIONS	150,000
OPEN EYE PICTURES 603 DEL GANADO ROAD 6036 SAN RAFAEL,CA 94903	N/A	P C	FOR THE SHORT DOCUMENTARY FILM "AMERICAN JUSTICE ON TRIAL"	60,000
OUR FAMILY COALITION 1385 MISSION STREET SUITE 340 SAN FRANCISCO,CA 94103	N/A	P C	GENERAL OPERATING	125,000
PROPUBLICA 155 AVENUE OF THE AMERICAS 13TH FLOOR NEW YORK,NY 10013	N/A	P C	TO SUPPORT THE FULL-TIME BEAT INVESTIGATING RISKS TO DEMOCRACY	175,000
REEL BLUES FEST PO BOX 624 89 WATER STREET SECOND FLOOR WOODS HOLE,MA 02543	N/A	P C	FOR THE DOCUMENTARY FILM "BONNE BLUE: JAMES COTTON'S LIFE IN THE BLUES"	25,000
REGENTS OF CALIFORNIA AT BERKELEY 101 ZELLERBACH HALL BERKELEY,CA 94720	N/A	P C	CAL PERFORMANCES	150,000
SF CONSERVATORY OF MUSIC 50 OAK STREET SAN FRANCISCO,CA 94102	N/A	P C	GENERAL OPERATING	333,000
SISTERS IN CINEMA 7140 SOUTH YATES BLVD CHICAGO,IL 60649	N/A	P C	NEW WATER SERVICE	25,000
SOUTH ARTS 1800 PEACHTREE STREET NW ATLANTA,GA 30309	N/A	P C	GENERAL OPERATING	7,500
TEMPLE UNIVERSITY 1801 N BROAD STREET CONWELL HALL STE 401 PHILADELPHIA,PA 19122	N/A	P C	FOR THE CREATION OF THE JONTHAN LOGAN CENTER FOR URBAN INVESTIGATIVE REPORTING	419,500

THE AFTERMATH PROJECT 4900 GLENALBYN DRIVE LOS ANGELES,CA 90065	N/A	P C	FOR THE 1492/1619 AMERICAN AFTERMATHS PROJECT	32,000
THE CIESLA FOUNDATION 5005 LINNEAN AVE NW WASHINGTON,DC 20008	N/A	P C	FOR THE DOCUMENTARY FILM "IMAGINING THE INDIAN"	36,400
THE FILM COLLABORATIVE 3405 CAZADOR STREET LOS ANGELES,CA 90065	N/A	P C	OUTREACH AND ENGAGEMENT CAMPAIGN FOR THE FILM "WELCOME TO CHECHNYA"	25,000
THE GROUNDTRUTH PROJECT 10 GUEST STREET BRIGHTON,MA 02135	N/A	P C	REPORT FOR AMERICA	200,000
THE MIAMI FOUNDATION 40 NW 3D ST SUITE 305 MIAMI,FL 33128	N/A	P C	NEWSMATCH	250,000
THE UNIVERSITY CORPORATION (SF STATE) SF STATE 1600 HOLLOWAY AVE SAN FRANCISCO,CA 94132	N/A	P C	SUPPORT QUEER CINEMA INSTITUTE	25,000
THE WORKING GROUPNIOT PO BOX 70232 OAKLAND,CA 94612	N/A	P C	DOCUMENTARY "TREE OF LIFE"	23,236
THIRD WORLD NEWSREEL 545 EIGHTH AVENUE SUITE 550 NEW YORK,NY 10018	N/A	P C	FOR THE DOCUMENTARY FILM "MAMA BEARS"	25,000
UNIVERSITY OF CHICAGO 915 EAST 60TH STREET CHICAGO,IL 60637	N/A	P C	BLUESFEST	274,000
UNIVERSITY OF CHICAGOLOGAN CENTER 915 EAST 60TH STREET CHICAGO,IL 60637	N/A	P C	STORYTELLING OVER 4 YEARS	2,000,000
WALKING IRIS MEDIA 2263 15TH ST SAN FRANCISCO,CA 94114	N/A	P C	FOR THE DOCUMENTARY FILM "HIDDEN LETTERS"	25,000
WGBH EDUCATION FOUNDATION ONE GUEST STREET BOSTON,MA 02135	N/A	P C	FRONTLINE FILM AMERICAN RECONNING	300,000
Total ▶ 3a				10,046,636
b <i>Approved for future payment</i> CAREY INSTITUTE FOR GLOBAL GOOD 63 HUYCK ROAD RENSSELAEVILLE,NY 12147	N/A	P C	LOGAN NONFICTION PROGRAM	477,000
CATAPULT FILM FUND 39 MESA ST STE 105 SAN FRANCISCO,CA 94129	N/A	P C	GENERAL OPERATING	360,000
CHICKEN AND EGG PICTURES 45 MAIN STREET 506 BROOKLYN,NY 11201	N/A	P C	GENERAL OPERATING	200,000
FINE ARTS MUSEUMS OF SAN FRANCISCO 50 HAGIWARA TEA GARDEN DR SAN FRANCISCO,CA 94118	N/A	P C	REVA AND DAVID COLLECTION OF ILLUSTRATED BOOKS	70,000
FIRST AMENDMENT COALITION 534 FOURTH STREET SUITE B SAN RAFAEL,CA 94901	N/A	P C	GENERAL OPERATING	400,000
FUND FOR INVESTIGATIVE JOURNALISM 110 VERMONT AVE NW SUITE 500 WASHINGTON,DC 20005	N/A	P C	GENERAL OPERATING	80,000
HOWARD UNIVERSITY 2400 SIXTH STREET NW WASHINGTON,DC 20059	N/A	P C	DIGITIZATION OF THE BLACK PRESS ARCHIVES, AS PART OF THE CENTER FOR DEMOCRACY AND JOURNALISM	1,443,000
INSTITUTE FOR NONPROFIT NEWS 714 W OLYMPIC BLVD 929 LOS ANGELES,CA 90015	N/A	P C	GENERAL OPERATING	300,000
INTERNATIONAL DOCUMENTARY ASSOCIATION 3470 WILSHIRE BLVD SUITE 980 LOS ANGELES,CA 90010	N/A	P C	ELEVATE GRANTS AND GETTING REAL CONFERENCE	1,200,000
INVISIBLE INSTITUTE 6100 S BLACKSTONE AVE CHICAGO,IL 60637	N/A	P C	ORGANIZATION CAPACITY BUILDING	1,300,000
KOVNO COMMUNICATIONS 2600 TENTH STREET BERKELEY,CA 94710	N/A	P C	GENERAL OPERATING	60,000
LITTLE VILLAGE FOUNDATION 606 ALAMO PINTADO ROAD SUITE 3-225 SOLVANG,CA 93463	N/A	P C	GENERAL OPERATING	50,000
LOS CENZONTLES	N/A	P C	OUTREACH ASSOCIATE	100,000

13108 SAN PABLO AVENUE SAN PABLO,CA 94805			POSITION	
MAKING GAY HISTORY 357 WEST 20TH STREET APT A NEW YORK,NY 10011	N/A	P C	PODCAST "MAKING GAY HISTORY"	75,000
MUCKROCK FOUNDATION 1151 MASSACHUSETTS AVE CAMBRIDGE,MA 02138	N/A	P C	GENERAL OPERATING	100,000
OUR FAMILY COALITION 1385 MISSION STREET SUITE 340 SAN FRANCISCO,CA 94103	N/A	P C	GENERAL OPERATING	125,000
PROPUBLICA 155 AVENUE OF THE AMERICAS 13TH FLOOR NEW YORK,NY 10013	N/A	P C	TO SUPPORT THE FULL-TIME BEAT INVESTIGATING RISKS TO DEMOCRACY	175,000
TEMPLE UNIVERSITY 1801 N BROAD STREET CONWELL HALL STE 401 PHILADELPHIA,PA 19122	N/A	P C	FOR THE CREATION OF THE JONTHAN LOGAN CENTER FOR URBAN INVESTIGATIVE REPORTING	764,000
THE AFTERMATH PROJECT 4900 GLENALBYN DRIVE LOS ANGELES,CA 90065	N/A	P C	FOR THE 1492/1619 AMERICAN AFTERMATHS PROJECT	128,000
THE CIESLA FOUNDATION 5005 LINNEAN AVE NW WASHINGTON,DC 20008	N/A	P C	FOR THE DOCUMENTARY FILM "IMAGINING THE INDIAN"	13,600
THE MARSHALL PROJECT 156 W 56TH ST 3RD FLOOR NEW YORK,NY 10019	N/A	P C	GENERAL OPERATING	1,000,000
THE MIAMI FOUNDATION 40 NW 3RD STREET SUITE 305 MIAMI,FL 33128	N/A	P C	NEWSMATCH	250,000
Total ► 3b				8,670,600

Part XV-A

Unrelated business income

Excluded by section 512, 513, or 514

(e)
Related or exempt
function income
(See
instructions.)

(a)
Business
code

(b)
Amount

(c)
Exclusion code

(d)
Amount

b _____

C _____

d _____

e _____

f _____

g Fees and contracts from government agencies

2 Membership dues and assessments

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

■ ■ ■

5 Net rental income or (loss) from real estate:

a Debt-financed property.

b Not debt-financed property. . . .

6 Net rental income or (loss) from personal property

7 Other investment income

8 Gain or (loss) from sales of assets other than inventory

9 Net income or (loss) from special events:

10 Gross profit or (loss) from sales of inventory

11 Other revenue: a _____

b _____

c _____

d _____

e _____

12 Subtotal. Add columns (b), (d), and (e) . . .

13 Total.	Add line 12, columns (b), (d), and (e).	13	<u>5,361,136</u>
(See worksheet in line 13 instructions to verify calculations.)			

Part XV-B

Line No.

▼

Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Part XVI

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. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

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 ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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.

	2022-11-09
Signature of officer or trustee	Date

2022-11-09

Title

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

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	SHAWNA HULS		2022-11-03		P01315330
	Firm's name ▶ RSM US LLP				Firm's EIN ▶ 42-071432
	Firm's address ▶ 201 FIRST ST SE STE 800 CEDAR RAPIDS, IA 524011512				Phone no. (319) 298-5333

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	59,700	29,850	0	29,850

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Name of Stock	End of Year Book Value	End of Year Fair Market Value
228 SHS BERKSHIRE HATHAWAY INC-CL A NET OF CALLS	27,829,843	102,425,136
8,083 SHS BERKSHIRE HATHAWAY INC-CL B	658,646	2,416,817

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,638	409	0	1,229

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGES	50	0	0	50
GRANTEE MEALS AND EXPENSES	871	0	0	871
INSURANCE	29,040	7,260	0	21,780
OFFICE SUPPLIES	872	218	0	654
GENERAL ADMINISTRATIVE EXPENSES	3,769	942	0	2,827
DUES AND SUBSCRIPTIONS	16,616	24	0	16,592
PAYROLL EXPENSES	54,490	13,622	0	40,868
INVESTMENT FEES	125,000	125,000	0	0
WEB DESIGN	855	0	0	855
TRAVEL MEALS	1,554	0	0	1,554
EXHIBIT EXPENSES - LEGAL AND PROFESSIONAL	1,134	0	0	1,134

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Description	Amount
RETURNED GRANT	121,000
DIFFERENCE BETWEEN COST AND FMV ON SECURITIES DONATED TO CHARITY	1,286,085

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Description	Beginning of Year - Book Value	End of Year - Book Value
CREDIT CARD PAYABLE	0	1,128
PAYROLL LIABILITIES	7,645	7,274

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER PROFESSIONAL FEES	30,765	0	0	30,765

TY 2021 IRS 990 e-File Render

Name: JONATHAN LOGAN FAMILY FOUNDATION

EIN: 47-2268391

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX EXPENSE	50,000	0	0	0
FRANCHISE TAX AND REGISTRATION FEES	150	0	0	150