

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.

For calendar year 2022, or tax year beginning 07-01-2022, and ending 06-30-2023

Name of foundation THE HEART FOUNDATION
A Employer identification number 45-0471117
B Telephone number (see instructions) (818) 865-1100
C If exemption application is pending, check here
D 1. Foreign organizations, check here
D 2. Foreign organizations meeting the 85% test, check here and attach computation
E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 8,464,144
J Accounting method: Accrual
(Part I, column (d) must be on cash basis.)

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))

Table with 4 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), followed by summary rows 27-29.

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	66,565	269,102	269,102
	2 Savings and temporary cash investments	2,086,190	2,220,045	2,220,045
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ <u>110,000</u> Less: allowance for doubtful accounts ▶ _____ <u>2,227</u>	14,104	107,773	107,773
	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	1,204	1,204	1,204
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)	3,295,209	3,347,967	3,347,967
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	2,215,745	2,513,740	2,513,740
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____	425	0	0
15 Other assets (describe ▶ _____)	4,120	4,313	4,313	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	7,683,562	8,464,144	8,464,144	
Liabilities	17 Accounts payable and accrued expenses	13,215	37,099	
	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 ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	13,215	37,099	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	7,655,347	8,317,045	
	25 Net assets with donor restrictions	15,000	110,000	
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
28 Retained earnings, accumulated income, endowment, or other funds				
29 Total net assets or fund balances (see instructions)	7,670,347	8,427,045		
30 Total liabilities and net assets/fund balances (see instructions)	7,683,562	8,464,144		

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	7,670,347
2 Enter amount from Part I, line 27a	2	568,239
3 Other increases not included in line 2 (itemize) ▶ _____	3	188,459
4 Add lines 1, 2, and 3	4	8,427,045
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	8,427,045

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 - STIFEL NICOLAUS #9314	P		
b PUBLICLY TRADED SECURITIES - STIFEL NICOLAUS #6732	P		
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 125,011		109,869	15,142
b 171,007		149,813	21,194
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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			15,142
b			21,194
c			
d			
e			

2 Capital gain net income or (net capital loss) <div style="float: right; border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 } </div>	2 36,336
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

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

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, tax under section 511, tax based on investment income, credits/payments, and total tax due/overpayment.

Part VI-A Statements Regarding Activities

Table with 10 rows for statements regarding activities. Includes questions about political campaigns, political expenditures, unrelated business income, and substantial contributors.

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.
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
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.THEHEARTFOUNDATION.ORG
14 The books are in care of CATHERINE MULLANEY Telephone no. (818) 865-1100 Located at 31822 VILLAGE CENTER RD 208 WESTLAKE VILLAGE CA 91361 ZIP+4
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 2022, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 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.

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?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(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)?
(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.)
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
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 2022?
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 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?. If "Yes," list the years 20, 20, 20, 20
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.)
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?
b If "Yes," did it have excess business holdings in 2022 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 2022.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022?

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:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)		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?	5a(5)		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		
c	Organizations relying on a current notice regarding disaster assistance check <input type="checkbox"/>			
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).	5d		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
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?	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
MARK LITMAN 31822 VILLAGE CENTER RD STE 208 WESTLAKE VILLAGE, CA 91361	CHAIRMAN 10.00	0	0	0
MARK SAPIRO 140 34TH STREET HERMOSA BEACH, CA 90254	TREASURER 1.00	0	0	0
GERALD COHEN 6935 MINSTREL AVENUE WEST HILLS, CA 91307	SECRETARY (DECEASED 6/23) 1.00	0	0	0
EVA WEINGARTEN 4611 WESTCHESTER DRIVE WOODLAND HILLS, CA 91364	BOARD MEMBER 1.00	0	0	0
BRIAN WEINHART 1479 S BEVERLY DR 101 LOS ANGELES, CA 90035	BOARD MEMBER 1.00	0	0	0
LISA SAPIRO 140 34TH STREET HERMOSA BEACH, CA 90254	BOARD MEMBER 1.00	0	0	0
CATHERINE MULLANEY 31822 VILLAGE CENTER RD STE 208 WESTLAKE VILLAGE, CA 91361	EXECUTIVE DIRECTOR 32.00	77,538	5,872	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
NONE				

Total number of other employees paid over \$50,000. **0**

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
NONE		

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
<p>1 THE HEART FOUNDATION EDUCATES THE PUBLIC AND INCREASES AWARENESS OF HEART DISEASE AS THE #1 CAUSE OF DEATH FOR BOTH WOMEN AND MEN IN THE UNITED STATES THROUGH OUR WEBSITE, SOCIAL MEDIA POSTS, EDUCATIONAL VIDEOS, AND ONLINE INTERVIEWS WITH MEDICAL PROFESSIONALS AND HEART HEALTH ADVOCATES. THE HEART FOUNDATION HAS OVER 42,000 FOLLOWERS ON OUR SOCIAL MEDIA CHANNELS, AND COUNTLESS MORE VISIT OUR WEBSITE AND VIEW OUR POSTS AND VIDEOS ALL OVER THE WORLD.</p>	35,000
<p>2</p>	
<p>3</p>	
<p>4</p>	

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
<p>1</p>	
<p>2</p>	
<p>All other program-related investments. See instructions.</p> <p>3</p>	
<p>Total. Add lines 1 through 3</p>	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	5,579,670
b	Average of monthly cash balances.	1b	2,487,243
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	8,066,913
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	8,066,913
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	121,004
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	7,945,909
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	397,295

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	397,295
2a	Tax on investment income for 2022 from Part V, line 5.	2a	2,187
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	2,187
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	395,108
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	395,108
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	395,108

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	1,344,312
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	1,344,312

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				395,108
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2017.	349,240			
b From 2018.	381,159			
c From 2019.	726,231			
d From 2020.	118,623			
e From 2021.	558,737			
f Total of lines 3a through e.	2,133,990			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ <u>1,344,312</u>				
a Applied to 2021, 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 2022 distributable amount				395,108
e Remaining amount distributed out of corpus	949,204			
5 Excess distributions carryover applied to 2022. (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	3,083,194			
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 2021. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				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 2017 not applied on line 5 or line 7 (see instructions)	349,240			
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a	2,733,954			
10 Analysis of line 9:				
a Excess from 2018	381,159			
b Excess from 2019	726,231			
c Excess from 2020.	118,623			
d Excess from 2021	558,737			
e Excess from 2022	949,204			

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

Table with 5 columns: (a) 2022, (b) 2021, (c) 2020, (d) 2019, (e) Total. Rows include: 1a Date of ruling; b Check box for 4942(j)(3) or 4942(j)(5); 2a-2e Qualifying distributions; 3 Alternative tests (Assets, Endowment, Support).

Part 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).)

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.

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:

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

c Any submission deadlines:

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

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> CEDARS SINAI MEDICAL CENTER 8700 BEVERLY BLVD LOS ANGELES, CA 90048	NONE	P C	HEART DISEASE RESEARCH	700,000
THE HAROLD & CAROLE PUMP FOUNDATION 13636 VENTURA BLVD SUITE 416 SHERMAN OAKS, CA 91423	NONE	P C	FUND RESEARCH FOR THE TREATMENT AND CURE OF CANCER	2,500
EPIDERMOLYSIS BULLOSA MEDICAL RESEARCH FOUNDATION 2757 ANCHOR AVE LOS ANGELES, CA 90064	NONE	P C	FUND RESEARCH TO FIND A CURE FOR EPIDERMOLYSIS BULLOSA	2,400
Total ▶ 3a				704,900
b <i>Approved for future payment</i>				
Total ▶ 3b				0

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 1 Program service revenue:
a
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

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include data for interest on investments, dividends, and special events.

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

13 Total. Add line 12, columns (b), (d), and (e). 13 5,396

(See worksheet in line 13 instructions to verify calculations.)

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: 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.

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B

Schedule of Contributors

OMB No. 1545-0047

(Form 990)
Department of the Treasury
Internal Revenue Service

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

2022

Name of the organization
THE HEART FOUNDATION

Employer identification number
45-0471117

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 other 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 33¹/₃% 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, 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 990PF, 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 THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 1-5 include MONARCH CHARITABLE FOUNDATION, FRANK & FAY MANCUSO, THE EISNER FOUNDATION INC, FRANK SHELLOCK, and JEFFREY & BARBARA SCAPA.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 7-12 include IRVING FEINTECH FAMILY FOUNDATION, NEIL SCHIMMEL, BANK OF AMERICA CHARITABLE GIFT FUND, JASON DINAPOLI, FISCH PROPERTIES LP, and MERKIN FAMILY FOUNDATION.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 13-18 include LELAND & PATRICIA POSTIL, BARRY & LYNNE SCHOLER, SWL INVESTMENT LTD, RICHARD & DRU MARGOLIS, 1ST CENTURY BANK, and CEDARS-SINAI MEDICAL CENTER.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 19-24 include MARYLYN J SEIBER PHD, GALPIN MOTORS INC, ANGELICA M CONTRERAS, ALFRED E MANN CHARITIES INC, JEWISH COMMUNITY FOUNDATION OF LOS ANGELES, and PAUL STANLEY.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 25-30 include ALBERT & ANGELA NASSI, THE SHERRY LANSING FOUNDATION, JACLYN B ROSENBERG, STRAUSS FOUNDATION, BARRY RUDIN, and PREM & MARY ANN AKKARAJU.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 31-36 include ESTATE OF RUSSELL BIEDERMAN, BOECKMANN CHARITABLE FOUNDATION, FIDELITY CHARITABLE, ASSOCIATED ADDRESS INTERNATIONAL, LEO & SYDELLE WARD FOUNDATION, and EASY CARE.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 37-42 include FIDELITY BROKERAGE SERVICES LLC, WILLIAM & SUSAN SILVERMAN, MOBILE CLEAR SHIELD LLC, RICHARD & HEIDI KAUFMAN, PAUL & DIANE MOHLEF, and TAILWINDS CHARITABLE FOUNDATION INC.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 43-48 include STEPHEN & NICOLETTE MCKEE, CENTRAL VALLEY AUTO BODY INC, JOHNNY CARSON FOUNDATION, DERRICK BALES, ANDREA PINES & MARK GOLDBERG, and AJH-BEH TRUST SURVIVORS TRUST.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 49-54 include JEFFREY & PAMELA BALTON, DAVID FOSTER, LAWRENCE & DIEDRE GORDON, BETTY HAYMAN, and JEWISH COMMUNITY FOUNDATION OF SOUTHERN ARIZONA.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 55-60 include BRUCE KARATZ, ROBERT MARGOLIS, THE RANDALL FAMILY FOUNDATION, GEORGE & JOLENE SCHLATTER, WILLIAM M SILVERMAN TRUST, and THE HAROLD & CAROLE PUMP FOUNDATION.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 61-66 include BRUCE KARATZ, ROBERT MARGOLIS, THE RANDALL FAMILY FOUNDATION, GEORGE & JOLENE SCHLATTER, WILLIAM M SILVERMAN TRUST, and THE HAROLD & CAROLE PUMP FOUNDATION.

Name of organization THE HEART FOUNDATION

Employer identification number 45-0471117

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

Table with 4 columns: (a) No., (b) Name, address, and ZIP + 4, (c) Total contributions, (d) Type of contribution. Rows 67-72 include BRUCE KARATZ, ROBERT MARGOLIS, THE RANDALL FAMILY FOUNDATION, GEORGE & JOLENE SCHLATTER, WILLIAM M SILVERMAN TRUST, and THE HAROLD & CAROLE PUMP FOUNDATION.

Name of organization
THE HEART FOUNDATION

Employer identification number
45-0471117

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

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

Name of organization THE HEART FOUNDATION	Employer identification number 45-0471117
--	--

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	
	_____	_____	
	_____	_____	

Additional Data

Return to Form

Software ID:

Software Version:

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	2,930	392		2,538

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Name of Bond	End of Year Book Value	End of Year Fair Market Value
STIFEL NICOLAUS - FIXED INCOME	3,347,967	3,347,967

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
STIFEL NICOLAUS - EQUITIES	FMV	2,513,740	2,513,740

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
CAPITALIZED WEBSITE COSTS	4,120	4,313	4,313

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SPECIAL EVENTS	412,741	0		400,437
IT EXPENSES	20,086	2,687		17,399
MERCHANT ACCOUNT FEES	2,290	306		1,984
OFFICE EXPENSES	6,806	910		5,896
INSURANCE	9,481	1,268		8,213
WEBSITE EXPENSE	20,863	2,791		18,072
DONOR/SUPPORTER APPRECIATION	41	0		41
MARKETING	731	98		633
AMORTIZATION	4,120	551		0
ADVERTISING AND PROMOTION	5,694	762		4,932

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
GROSS INCOME FROM SPECIAL FUNDRAISING EVENTS	180,855		180,855

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Description	Amount
NET UNREALIZED GAIN ON INVESTMENTS	188,459

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	42,340	42,340		0
OTHER PROFESSIONAL FEES	4	1		3

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Name	Address
MONARCH CHARITABLE FOUNDATION	4050 SPENCER ST STE E TORRANCE,CA 90503
FRANK FAY MANCUSO	377 S MAPLETON DR LOS ANGELES,CA 900241806
THE EISNER FOUNDATION INC	9696 CULVER BLVD STE 205 CULVER CITY,CA 90232
FRANK SHELLOCK	7751 VERAGUA DR PLAYA DEL REY,CA 90023
JEFFRY BARBARA SCAPA	1501 N DOHENY DRIVE LOS ANGELES,CA 90069

TY 2022 IRS 990 e-File Render

Name: THE HEART FOUNDATION

EIN: 45-0471117

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEES	30	0		30