

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 2023, or tax year beginning 04-01-2023, and ending 03-31-2024

Name of foundation: PETER G PETERSON FOUNDATION. A Employer identification number: 26-0316905. B Telephone number: (212) 542-9200. C If exemption application is pending, check here. D 1. Foreign organizations, check here. 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. H Check type of organization: Section 501(c)(3) exempt private foundation. J Accounting method: Accrual.

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 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include: 1 Contributions, gifts, grants, etc., received; 2 Check if the foundation is not required to attach Sch. B; 3 Interest on savings and temporary cash investments; 4 Dividends and interest from securities; 5a Gross rents; 5b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10; 6b Gross sales price for all assets on line 6a; 7 Capital gain net income; 8 Net short-term capital gain; 9 Income modifications; 10a Gross sales less returns and allowances; 10b Less: Cost of goods sold; 10c Gross profit or (loss); 11 Other income; 12 Total. Add lines 1 through 11; 13 Compensation of officers, directors, trustees, etc.; 14 Other employee salaries and wages; 15 Pension plans, employee benefits; 16a Legal fees; 16b Accounting fees; 16c Other professional fees; 17 Interest; 18 Taxes; 19 Depreciation; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses; 24 Total operating and administrative expenses; 25 Contributions, gifts, grants paid; 26 Total expenses and disbursements; 27 Subtract line 26 from line 12; a Excess of revenue over expenses and disbursements; b Net investment income; c Adjusted net income.

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

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	994,471,923
2 Enter amount from Part I, line 27a	2	-5,611,349
3 Other increases not included in line 2 (itemize) ▶ _____	3	93,140,872
4 Add lines 1, 2, and 3	4	1,082,001,446
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	1,082,001,446

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include PARTNERSHIP K-1, OTHER SECURITIES, SALE OF PARTNERSHIP INTEREST - AIO IV AIV LP, etc.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows include a through e with numerical values.

Table with 4 columns: (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), (l) Gains (Col. (h) gain minus col. (k)).

Summary rows for capital gain net income (line 2) and net short-term capital gain or loss (line 3).

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

Table for excise tax calculation with 11 rows (1a-11) and multiple columns for amounts and descriptions. Includes sections for exempt operating foundations, tax under section 511, and tax based on investment income.

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?

Table with columns Yes, No and row 1a

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

Table with columns Yes, No and row 1b

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.

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

Table with columns Yes, No and row 1c

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

Table with columns Yes, No and row 2

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.

Table with columns Yes, No and row 3

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

Table with columns Yes, No and row 4a

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

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

Table with columns Yes, No and row 4b

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

Table with columns Yes, No and row 5

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

Table with columns Yes, No and row 6

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

Table with columns Yes, No and row 7

8a Enter the states to which the foundation reports or with which it is registered (see instructions) CO, DC, IA, MA, NY, OH, VA

Table with columns Yes, No and row 8b

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

Table with columns Yes, No and row 9

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII.

Table with columns Yes, No and row 10

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

Table with columns Yes, No and row 11

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.

Table with columns Yes, No and row 12

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.

Table with columns Yes, No and row 13

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.PGPF.ORG

Table with columns Yes, No and row 14

14 The books are in care of PETER G PETERSON FOUNDATION Telephone no. (212) 542-9200 Located at 888-C EIGHTH AVENUE BOX 144 NEW YORK NY 10019 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.

Table with columns Yes, No and row 15

16 At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country.

Table with columns Yes, No and row 16

Table with columns Yes, No and row 16

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 2023?
- 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 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?
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 2023 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)
- 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 2023?

	Yes	No
1a(1)		No
1a(2)		No
1a(3)	Yes	
1a(4)	Yes	
1a(5)		No
1a(6)		No
1b		No
1d		No
2a		No
2b		
3a		No
3b		
4a		No
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:		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
MICHAEL A PETERSON 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	DIRECTOR, CHAIRMAN & CEO 40.00	0	0	0
JOAN GANZ COONEY 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	DIRECTOR 2.00	0	0	0
MICHAEL SHANKMAN 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	TREASURER 10.00	0	0	0
SUK YUN WON 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	CHIEF OPERATING OFFICER 40.00	453,375	50,037	0
LORETTA UCELLI 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	EVP - STRATEGY & COMMUNICATIONS 40.00	243,340	42,875	0
JEFFREY HOLLAND 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	VICE PRESIDENT, RESEARCH 40.00	312,787	51,279	0
LAURA GORDON 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	VP, COMMUNICATIONS & PUBLIC AFFAIRS 40.00	295,667	14,288	0
MYRA SUNG 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	VICE PRESIDENT, PROGRAMS 40.00	269,508	13,086	0
CAROLINE PEARSON 888-C EIGHTH AVENUE BOX 144 NEW YORK, NY 10019	EXECUTIVE DIRECTOR, PCH, PHTI 40.00	494,546	69,521	0

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
EAST END ADVISORS LLC 610 FIFTH AVENUE SUITE 506 NEW YORK, NY 10020	INVESTMENT MGMT	2,374,692
MANATT PHELPS & PHILLIPS LLP 2049 CENTURY PARK EAST SUITE 1700 LOS ANGELES, CA 900673101	RESEARCH	1,278,638
FRANK N MAGID ASSOCIATES INC 8500 NORMANDALE LAKE BLVD STE 630 MINNEAPOLIS, MN 55437	RESEARCH	645,000
NORC AT THE UNIVERSITY OF CHICAGO 55 EAST MONROE STREET 20TH FLOOR CHICAGO, IL 60603	RESEARCH	635,000
CURTA INC 113 CHERRY ST PMB 45802 SEATTLE, WA 98104	RESEARCH	508,543

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

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 FOUNDATION ACTIVITIES - SEE STATEMENT 19 FOR OVERVIEW GRANTS AND GRANT-MAKING THE FOUNDATION PROVIDES GRANTS TO FUND A VARIETY OF PROJECTS AND ORGANIZATIONS THAT ADVANCE ITS MISSION. GRANTEEES INCLUDE RESEARCH ORGANIZATIONS, FOUNDATIONS, UNIVERSITIES, ASSOCIATIONS, AND OTHER NOT-FOR-PROFIT ENTITIES THAT ENGAGE IN ACTIVITIES OUTLINED UNDER GRANT AGREEMENTS WITH THE FOUNDATION. THESE GRANTS SUPPORT A RANGE OF EDUCATION, ENGAGEMENT, RESEARCH PROJECTS AND INITIATIVES RELATED TO THE NATION'S LONG-TERM FISCAL OUTLOOK, HEALTHCARE PERFORMANCE AND FUNCTIONING DEMOCRACY. A COMPLETE LISTING OF OUR PAID GRANTS IN FISCAL YEAR 2023 CAN BE FOUND IN PART XIV.</p>	<p><u>27,980,930</u></p>
<p>2 EDUCATION, AWARENESS, AND ENGAGEMENT THE FOUNDATION'S EDUCATION, AWARENESS, AND ENGAGEMENT INITIATIVES SEEK TO IMPROVE AMERICANS' UNDERSTANDING OF AND PARTICIPATION IN SUPPORTING FISCAL SUSTAINABILITY AND ECONOMIC RESILIENCY, HEALTHCARE EFFICIENCY AND AN EFFECTIVE DEMOCRACY FOR THE NEXT GENERATION. THE FOUNDATION PRODUCES INFORMATION ON VARIOUS POLICY TOPICS FOR THE GENERAL PUBLIC; CONNECTS A RANGE OF AUDIENCES WITH NON-PARTISAN RESOURCES AND INFORMATION; AND ISSUES POLICY RESEARCH BRIEFS AND STATEMENTS AROUND KEY MILESTONES. THE FOUNDATION ENABLES BROAD DISCOURSE REGARDING ITS CORE PROGRAM AREAS THROUGH ITS WEBSITES AND SOCIAL MEDIA.</p>	<p><u>10,683,589</u></p>
<p>3 POLICY, RESEARCH AND ANALYSIS THE FOUNDATION PRODUCES NON-PARTISAN RESEARCH, ANALYSES, AND OTHER DATA-DRIVEN INFORMATION TO HELP MAKE COMPLEX FISCAL, HEALTHCARE, AND ECONOMIC ISSUES MORE UNDERSTANDABLE TO THE PUBLIC, THE MEDIA, POLICYMAKERS AND OTHER STAKEHOLDERS. THE FOUNDATION'S RESEARCH AND ANALYSES ARE INCORPORATED INTO ITS EDUCATION, AWARENESS, AND ENGAGEMENT ACTIVITIES, AND ARE MADE ACCESSIBLE THROUGH MULTIPLE CHANNELS, INCLUDING THE FOUNDATION'S WEBSITES, PUBLIC COMMUNICATIONS, AND SOCIAL MEDIA.</p>	<p><u>4,143,262</u></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>	<p>0</p>

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	240,927,855
b	Average of monthly cash balances.	1b	28,047,622
c	Fair market value of all other assets (see instructions).	1c	805,117,538
d	Total (add lines 1a, b, and c).	1d	1,074,093,015
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	1,074,093,015
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	16,111,395
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	1,057,981,620
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	52,899,081

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	52,899,081
2a	Tax on investment income for 2022 from Part V, line 5.	2a	364,930
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	277,840
c	Add lines 2a and 2b.	2c	642,770
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	52,256,311
4	Recoveries of amounts treated as qualifying distributions.	4	527,819
5	Add lines 3 and 4.	5	52,784,130
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	52,784,130

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	47,912,584
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	47,912,584

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				52,784,130
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			45,598,932	
b Total for prior years: 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018.				
b From 2019.				
c From 2020.				
d From 2021.				
e From 2022.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ <u>47,912,584</u>				
a Applied to 2022, but not more than line 2a			45,598,932	
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 2023 distributable amount				2,313,652
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2023. (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	0			
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 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				50,470,478
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 2018 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9:				
a Excess from 2019				
b Excess from 2020				
c Excess from 2021.				
d Excess from 2022				
e Excess from 2023				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2023, enter the date of the ruling					
b Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, 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 IX, 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 Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

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

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

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 e-mail address of the person to whom applications should be addressed:
 PETER G PETERSON FOUNDATION
 888-C EIGHTH AVENUE BOX 144
 NEW YORK, NY 10019
 (212) 542-9200
 INQUIRIES@PGPF.ORG

b The form in which applications should be submitted and information and materials they should include:
 SEE STATEMENT 20

c Any submission deadlines:
 SEE STATEMENT 20

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
 SEE STATEMENT 20

Part 990-PF (2023)		Supplementary Information (continued)			Page 11
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	
a Paid during the year					
AMERICAN ACADEMY OF POLITICAL AND SOCIAL SCIENCE 220 SOUTH 40TH STREET 201-E PHILADELPHIA, PA 191043543		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	5,000	
AMERICAN ACTION FORUM INC 1747 PENNSYLVANIA AVE NW SUITE 5 WASHINGTON, DC 200064604		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250	
AMERICAN ACTION FORUM INC 1747 PENNSYLVANIA AVE NW SUITE 5 WASHINGTON, DC 200064604		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RESEARCH 1789 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250	
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RESEARCH 1789 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
ASSOCIATION FOR PUBLIC POLICY ANALYSIS AND MANAGEMENT 1100 VERMONT AVENUE NW SUITE 650 WASHINGTON, DC 200056347		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	13,500	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO ADVANCE BIPARTISAN FISCAL POLICY SOLUTIONS THROUGH RESEARCH AND PUBLIC ENGAGEMENT.	425,000	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO SUPPORT RESEARCH ON THE EFFECTS OF WEALTH TRANSFERS ON THE TAX SYSTEM.	250,000	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	225,000	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	93,860	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	25,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO DEVELOP AND ANALYZE BIPARTISAN POLICY SOLUTIONS THAT STRENGTHEN AND PROMOTE THE SUSTAINABILITY OF THE SOCIAL SECURITY PROGRAM.	150,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO UPDATE, MAINTAIN, AND PROMOTE THE FISCAL SHIP, AN ONLINE GAME THAT CHALLENGES PLAYERS TO PUT THE FEDERAL BUDGET ON A SUSTAINABLE COURSE.	110,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO SUPPORT RESEARCH ON THE EFFECTS OF WEALTH TRANSFERS ON THE TAX SYSTEM.	70,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
BROWN UNIVERSITY OF PROVIDENCE 121 SOUTH MAIN STREET PROVIDENCE, RI 029034202		PC	TO FUND SELECTED PANDEMIC-RELATED RESEARCH PROJECTS THROUGH THE PETER G. PETERSON FOUNDATION POLICY RESEARCH FUND.	200,000	
BUSINESS EXECUTIVES FOR NATIONAL SECURITY 1030 15TH STREET NW SUITE 200 E WASHINGTON, DC 200051503		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
CENTER FOR AMERICAN PROGRESS 1333 H ST NW SUITE 100E WASHINGTON, DC 200054746		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250	
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW SUITE 100E WASHINGTON, DC 200054746		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW SUITE 100E WASHINGTON, DC 200054746		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
CENTER FOR HEALTH CARE STRATEGIES INC 300 AMERICAN METRO BLVD SUITE 125 HAMILTON, NJ 086192371		PC	TO DEVELOP THE BETTER CARE PLAYBOOK, AN ONLINE RESOURCE FOR STAKEHOLDERS SEEKING TO IMPROVE THE QUALITY AND LOWER THE COST OF CARE FOR HIGH-NEED PATIENTS.	139,000	
CITIZENS BUDGET COMMISSION INC 240 WEST 35TH ST SUITE 302 NEW YORK, NY 100012506		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	28,000	
BILL HILLARY & CHELSEA CLINTON FOUNDATION 1200 PRESIDENT CLINTON AVENUE LITTLE ROCK, AR 722010000		PC	TO SUPPORT THE EXECUTION OF UP TO US, A NATIONWIDE NONPARTISAN INITIATIVE EMPOWERING COLLEGE STUDENTS TO EDUCATE AND ENGAGE THEIR PEERS ON AMERICA'S FISCAL CHALLENGES AND THE IMPACT ON THEIR FUTURE.	250,000	
COALITION TO TRANSFORM ADVANCED CARE 601 MASSACHUSETTS AVE NW SUITE 520 WASHINGTON, DC 200434364		PC	TO SUPPORT HEALTHCARE PRACTICES THAT ENSURE COMPASSIONATE, COORDINATED CARE FOR INDIVIDUALS WITH ADVANCED ILLNESS.	125,000	
COALITION TO TRANSFORM ADVANCED CARE 601 MASSACHUSETTS AVE NW SUITE 520 WASHINGTON, DC 200434364		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1025 CONNECTICUT AVENUE NW SUITE 1100 WASHINGTON, DC 200363536		PC	TO ADVANCE A RESPONSIBLE FISCAL POLICY AND BUDGET PROCESS REFORM THROUGH POLICY RESEARCH, OUTREACH, AND PUBLIC ENGAGEMENT.	2,543,545	
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1025 CONNECTICUT AVENUE NW SUITE 1100 WASHINGTON, DC 200363536		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
CONCORD COALITION CORP 1530 WILSON BLVD STE 550 ARLINGTON, VA 222092455		PC	TO EDUCATE THE PUBLIC ABOUT THE CAUSES AND CONSEQUENCES OF FEDERAL BUDGET DEFICITS AND THE IMPORTANCE OF BUILDING A SECURE FISCAL FOUNDATION FOR ECONOMIC GROWTH.	750,000	
CONFERENCE BOARD INC 845 THIRD AVENUE THIRD FLOOR NEW YORK, NY 100226600		SO I	TO SUPPORT RESEARCH AND OUTREACH PROMOTING FISCAL SUSTAINABILITY AMONG POLICYMAKERS AND LEADERSHIP EXPERTS WORLDWIDE.	100,000	
CONFERENCE BOARD INC 845 THIRD AVENUE THIRD FLOOR NEW YORK, NY 100226600		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	50,000	
COUNCIL FOR ECONOMIC EDUCATION 122 EAST 42ND ST SUITE 1012 NEW YORK, NY 10017		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
DIGITAL MEDICINE SOCIETY INC 90 CANAL STREET 4TH FL BOSTON, MA 021142022		PC	TO SUPPORT INTEGRATED EVIDENCE PLANS FOR DIGITAL HEALTH PRODUCTS.	100,000	
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW SUITE 600 WASHINGTON, DC 200055960		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250	
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW SUITE 600 WASHINGTON, DC 200055960		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
ELECTION TRUST INITIATIVE LLC 901 E STREET NW WASHINGTON, DC 200042037		PC	TO SUPPORT NONPARTISAN INITIATIVES TO IMPROVE THE SYSTEM FOR ADMINISTERING ELECTIONS IN THE UNITED STATES.	5,000,000	
FISCAL CHALLENGE INC 115 TUCKERS POND DRIVE CHAPEL HILL, NC 275164390		SO I	TO SUPPORT A COMPETITION FOR COLLEGE STUDENTS TO DEVELOP BUDGET PLANS THAT STABILIZE FEDERAL DEBT AS A SHARE OF THE ECONOMY OVER THE LONG TERM.	52,933	
THE FOUNDATION FOR RESEARCH ON EQUAL OPPORTUNITY 650 MASSACHUSETTS AVENUE NW SUITE 606 WASHINGTON, DC 20001		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
HOWARD UNIVERSITY 2244 10TH STREET ROOM 302 WASHINGTON, DC 200590001		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS THROUGH SUPPORT OF THE AMERICAN ECONOMIC ASSOCIATION SUMMER TRAINING PROGRAM, IN PARTNERSHIP WITH THE WOMENS INSTITUTE FOR SCIENCE, EQUITY, AND RACE.	200,000	
INDEPENDENT SECTOR 1602 L STREET NW SUITE 900 WASHINGTON, DC 200365682		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
INSTITUTE FOR CLINICAL AND ECONOMIC REVIEW 14 BEACON STREET SUITE 800 BOSTON, MA 021083704		PC	TO SUPPORT THE ASSESSMENT OF DIGITAL HEALTH TECHNOLOGIES.	125,000	
HENRY J KAISER FAMILY FOUNDATION 185 BERRY STREET SUITE 2000 SAN FRANCISCO, CA 941071704		PC	TO SUPPORT AND EXPAND THE PETERSON-KAISER HEALTH SYSTEM TRACKER, A RESOURCE TO MONITOR PERFORMANCE OF THE U.S. HEALTHCARE SYSTEM.	1,700,000	
HENRY J KAISER FAMILY FOUNDATION 185 BERRY STREET SUITE 2000 SAN FRANCISCO, CA 941071704		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC 52 VANDERBILT AVENUE NEW YORK, NY 100173808		PC	TO DEVELOP POLICY SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250	
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC 52 VANDERBILT AVENUE NEW YORK, NY 100173808		PC	TO DEVELOP POLICY RESEARCH PAPERS ON FISCAL ISSUES AND SOLUTIONS.	120,000	
MERCATUS CENTER INC 3434 WASHINGTON BLVD ARLINGTON, VA 222014540		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
MILBANK MEMORIAL FUND 645 MADISON AVE 12TH FLOOR NEW YORK, NY 100221010		EOF	TO HELP STATES DEVELOP AND IMPLEMENT COST GROWTH TARGETS TO IMPROVE HEALTHCARE AFFORDABILITY.	1,810,000	
NABE FOUNDATION OF THE NATIONAL ASSOCIATION FOR BUSINESS ECONOMICS 1020 19TH STREET NW SUITE 550 WASHINGTON, DC 20036		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	40,000	
NATIONAL ACADEMY OF SCIENCES 500 FIFTH STREET NW WASHINGTON, DC 20001		SO I	TO DEVELOP APPROACHES TO ALIGN PHARMACEUTICAL INVESTMENTS WITH UNMET HEALTH NEEDS.	350,000	
NATIONAL ACADEMY OF SOCIAL INSURANCE 1441 L ST NW SUITE 530 WASHINGTON, DC 200054679		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	15,000	
NATIONAL ASSOCIATION OF HEALTH DATA ORGANIZATIONS 965 E CENTER ST PROVO, UT 846063535		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	3,750	
NATIONAL BUREAU OF ECONOMIC RESEARCH INC 1050 MASSACHUSETTS AVENUE CAMBRIDGE, MA 021385359		PC	TO SUPPORT A POST-DOCTORAL FELLOWSHIP PROGRAM ON LONG-TERM FISCAL POLICY.	175,500	
NET IMPACT 1333 BROADWAY SUITE 250 OAKLAND, CA 946122081		PC	TO SUPPORT THE EXECUTION OF UP TO US, A NATIONWIDE NONPARTISAN INITIATIVE EMPOWERING COLLEGE STUDENTS TO EDUCATE AND ENGAGE THEIR PEERS ON AMERICA'S FISCAL CHALLENGES AND THE IMPACT ON THEIR FUTURE.	1,077,000	
NUCLEAR THREAT INITIATIVE INC 1776 EYE STREET NW SUITE 600 WASHINGTON, DC 20006		PC	TO SUPPORT NTI'S EFFORT TO IMPROVE GLOBAL NUCLEAR SECURITY THROUGH RESEARCH ON NUCLEAR MATERIALS SECURITY AND THE ENGAGEMENT AND DEVELOPMENT OF LEADERSHIP NETWORKS AND POLICYMAKERS WORLDWIDE.	1,500,000	
NUCLEAR THREAT INITIATIVE INC 1776 EYE STREET NW SUITE 600 WASHINGTON, DC 20006		PC	TO SUPPORT INTERNATIONAL NETWORKS TO ADVANCE NUCLEAR SAFETY AND SECURITY.	500,000	
PANETTA INSTITUTE FOR PUBLIC POLICY 100 CAMPUS CENTER BUILDING 86E SEASIDE, CA 939558000		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	15,000	
PETER G PETERSON INSTITUTE FOR INTERNATIONAL ECONOMICS 1750 MASSACHUSETTS AVE NW WASHINGTON, DC 200361903		PC	TO SUPPORT NON-PARTISAN RESEARCH AND ANALYSIS ON GLOBAL AND DOMESTIC FISCAL AND ECONOMIC POLICY.	3,000,000	
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT RESEARCH, ANALYSIS AND OUTREACH TO PROMOTE FISCAL SUSTAINABILITY.	225,000	
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	206,250	
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
ROCK HEALTH FOUNDATION 333 BUSH STREET FL 4 SAN FRANCISCO, CA 941042854		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	100,000	
SADIE COLLECTIVE 712 H STREET NE PMB 94370 WASHINGTON, DC 200023627		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
SADIE COLLECTIVE 712 H STREET NE PMB 94370 WASHINGTON, DC 200023627		PC	TO DEVELOP A PROGRAM FOR HIGH SCHOOL STUDENTS THAT INCREASES DIVERSITY IN THE FIELD OF ECONOMICS.	23,000	
UNIVERSITY OF CHICAGO 6054 S DREXEL AVE SUITE 400 CHICAGO, IL 606372612		PC	TO FUND SELECTED PANDEMIC-RELATED RESEARCH PROJECTS THROUGH THE PETER G. PETERSON FOUNDATION POLICY RESEARCH FUND.	200,000	
UNIVERSITY OF CHICAGO 6054 S DREXEL AVE SUITE 400 CHICAGO, IL 606372612		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS AND PROMOTE GREATER INCLUSION IN FISCAL AND ECONOMIC POLICYMAKING.	72,884	
UNIVERSITY OF SOUTHERN CALIFORNIA 3500 SOUTH FIGUEROA STREET SUITE 102 LOS ANGELES, CA 900898003		SO I	TO FUND SELECTED PANDEMIC-RELATED RESEARCH PROJECTS THROUGH THE PETER G. PETERSON FOUNDATION POLICY RESEARCH FUND.	200,000	
UNIVERSITY OF WASHINGTON 4333 BROOKLYN AVE NE SEATTLE, WA 98195		GOV	TO CREATE THE FIRST THEATRE MARKET OF U.S. HEALTHCARE EXPENDITURES AND VALUE AT THE COUNTY LEVEL.	180,000	
URBAN INSTITUTE 500 LINFANT PLAZA SW 2ND FLOOR WASHINGTON, DC 200242274		PC	TO SUPPORT EVENTS AND IMPROVE UNDERSTANDING OF THE DRIVERS OF AMERICA'S FISCAL CHALLENGES.	108,000	
URBAN INSTITUTE 500 LINFANT PLAZA SW 2ND FLOOR WASHINGTON, DC 200242274		PC	TO SUPPORT KIDS' SHARE, A PROJECT MEASURING SPENDING ON CHILDREN IN THE FEDERAL BUDGET.	60,000	
URBAN INSTITUTE 500 LINFANT PLAZA SW 2ND FLOOR WASHINGTON, DC 200242274		PC	TO SUPPORT TAX POLICY CENTER'S FEDERAL TAX MODEL AND RESEARCH ANALYSIS OF FISCAL POLICY DEVELOPMENTS.	50,000	
URBAN INSTITUTE 500 LINFANT PLAZA SW 2ND FLOOR WASHINGTON, DC 200242274		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	5,860	
THE VOLCKER ALLIANCE 39 BROADWAY SUITE 1930 NEW YORK, NY 100063153		PC	TO RESEARCH AND REPORT ON BEST PRACTICES IN MANAGING STATE AND LOCAL BUDGETS DURING THE COVID-19 PANDEMIC, WITH A FOCUS ON NEW YORK STATE AND NEW YORK CITY.	300,000	
WASHINGTON STATE HEALTH CARE AUTHORITY 626 8TH AVENUE SE OLYMPIA, WA 98501		GOV	TO IDENTIFY AND ADDRESS DRIVERS OF HEALTHCARE COST GROWTH IN WASHINGTON STATE.	310,100	
WOMENS CONGRESSIONAL POLICY INSTITUTE 409 12TH STREET SUITE 702 WASHINGTON, DC 200242125		PC	TO SUPPORT EVENTS AND CORE ACTIVITIES.	25,000	
WOMENS INSTITUTE FOR SCIENCE EQUITY AND RACE 9291 LAUREL GROVE SUITE 92 MECHANICSVILLE, VA 231163851		PC	TO INCREASE DIVERSITY IN THE FIELD OF ECONOMICS AND PROMOTE GREATER INCLUSION IN FISCAL AND ECONOMIC POLICYMAKING THROUGH SUPPORT OF THE AMERICAN ECONOMIC ASSOCIATION SUMMER TRAINING PROGRAM, HOSTED BY HOWARD UNIVERSITY.	100,000	
Total				24,968,422	
b Approved for future payment					
AMERICAN ACTION FORUM INC 1747 PENNSYLVANIA AVE NW SUITE 5 WASHINGTON, DC 200064604		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750	
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RESEARCH 1789 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO ADVANCE BIPARTISAN FISCAL AND ECONOMIC POLICY SOLUTIONS THROUGH RESEARCH AND PUBLIC ENGAGEMENT.	100,000	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750	
BIPARTISAN POLICY CENTER INC 1225 EYE STREET NW SUITE 1000 WASHINGTON, DC 200053914		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	16,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO DEVELOP POLICY RESEARCH TO STABILIZE PROGRAMS THAT SUPPORT OLDER ADULTS.	150,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO UPDATE, MAINTAIN, AND PROMOTE THE FISCAL SHIP, AN ONLINE GAME THAT CHALLENGES PLAYERS TO PUT THE FEDERAL BUDGET ON A SUSTAINABLE COURSE.	76,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO SUPPORT RESEARCH ON THE EFFECTS OF WEALTH TRANSFERS ON THE TAX SYSTEM.	30,000	
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE NW WASHINGTON, DC 200362103		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	6,000	
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW SUITE 100E WASHINGTON, DC 200054746		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750	
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW SUITE 100E WASHINGTON, DC 200054746		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	6,000	
CENTER FOR HEALTH CARE STRATEGIES INC 300 AMERICAN METRO BLVD SUITE 125 HAMILTON, NJ 086192371		PC	TO DEVELOP THE BETTER CARE PLAYBOOK, AN ONLINE RESOURCE FOR STAKEHOLDERS SEEKING TO IMPROVE THE QUALITY AND LOWER THE COST OF CARE FOR HIGH-NEED PATIENTS.	90,000	
COALITION TO TRANSFORM ADVANCED CARE 601 MASSACHUSETTS AVE NW SUITE 520 WASHINGTON, DC 200434364		PC	TO SUPPORT HEALTHCARE PRACTICES THAT ENSURE COMPASSIONATE, COORDINATED CARE FOR INDIVIDUALS WITH ADVANCED ILLNESS.	100,000	
CONFERENCE BOARD INC 845 THIRD AVENUE THIRD FLOOR NEW YORK, NY 100226600		SO I	TO SUPPORT RESEARCH AND OUTREACH PROMOTING FISCAL SUSTAINABILITY AMONG POLICYMAKERS AND LEADERSHIP EXPERTS WORLDWIDE.	360,000	
DIGITAL MEDICINE SOCIETY INC 90 CANAL STREET 4TH FL BOSTON, MA 021142022		PC	TO SUPPORT INTEGRATED EVIDENCE PLANS FOR DIGITAL HEALTH PRODUCTS.	100,000	
ECONOMIC POLICY INSTITUTE 1225 EYE STREET NW SUITE 600 WASHINGTON, DC 200055960		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750	
FISCAL CHALLENGE INC 115 TUCKERS POND DRIVE CHAPEL HILL, NC 275164390		SO I	TO SUPPORT A COMPETITION FOR COLLEGE STUDENTS TO DEVELOP BUDGET PLANS THAT STABILIZE FEDERAL DEBT AS A SHARE OF THE ECONOMY OVER THE LONG TERM.	71,000	
INSTITUTE FOR CLINICAL AND ECONOMIC REVIEW 14 BEACON STREET SUITE 800 BOSTON, MA 021080000		PC	TO SUPPORT THE ASSESSMENT OF DIGITAL HEALTH TECHNOLOGIES.	30,000	
HENRY J KAISER FAMILY FOUNDATION 185 BERRY STREET SUITE 2000 SAN FRANCISCO, CA 941071704		PC	TO SUPPORT AND EXPAND THE PETERSON-KAISER HEALTH SYSTEM TRACKER, A RESOURCE TO MONITOR PERFORMANCE OF THE U.S. HEALTHCARE SYSTEM.	1,795,000	
HENRY J KAISER FAMILY FOUNDATION 185 BERRY STREET SUITE 2000 SAN FRANCISCO, CA 941071704		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	6,000	
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC 52 VANDERBILT AVENUE NEW YORK, NY 100173808		PC	TO DEVELOP POLICY SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	283,000	
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC 52 VANDERBILT AVENUE NEW YORK, NY 100173808		PC	TO DEVELOP POLICY RESEARCH PAPERS ON FISCAL ISSUES AND SOLUTIONS.	68,750	
NATIONAL ACADEMY OF SCIENCES 500 FIFTH STREET NW WASHINGTON, DC 20001		SO I	TO DEVELOP APPROACHES TO ALIGN PHARMACEUTICAL INVESTMENTS WITH UNMET HEALTH NEEDS.	150,000	
NATIONAL TAX ASSOCIATION TAX INSTITUTE OF AMERICA 1100 VERMONT AVE NW SUITE 650 WASHINGTON, DC 20005		SO I	TO SUPPORT EVENTS AND CORE ACTIVITIES.	10,000	
NET IMPACT 1333 BROADWAY SUITE 250 OAKLAND, CA 946122081		PC	TO SUPPORT THE EXECUTION OF UP TO US, A NATIONWIDE NONPARTISAN INITIATIVE EMPOWERING COLLEGE STUDENTS TO EDUCATE AND ENGAGE THEIR PEERS ON AMERICA'S FISCAL CHALLENGES AND THE IMPACT ON THEIR FUTURE.	750,000	
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE DEVELOPMENT OF COMPREHENSIVE SOLUTIONS TO ADDRESS THE NATION'S LONG-TERM FISCAL CHALLENGES, AS PART OF THE PETER G. PETERSON FOUNDATION SOLUTIONS INITIATIVE.	68,750	
PROGRESSIVE POLICY INSTITUTE 1919 M STREET NW SUITE 300 WASHINGTON, DC 20036		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	6,000	
SADIE COLLECTIVE 712 H STREET NE PMB 94370 WASHINGTON, DC 200023627		PC	TO DEVELOP A PROGRAM FOR HIGH SCHOOL STUDENTS THAT INCREASES DIVERSITY IN ECONOMICS.	2,000	
URBAN INSTITUTE 500 LINFANT PLAZA SW 2ND FLOOR WASHINGTON, DC 200242274		PC	TO SUPPORT THE PETER G. PETERSON FOUNDATION FISCAL INTERNSHIP PROGRAM.	6,000	
WASHINGTON STATE HEALTH CARE AUTHORITY 626 8TH AVENUE SE OLYMPIA, WA 98501		GOV	TO IDENTIFY AND ADDRESS DRIVERS OF HEALTHCARE COST GROWTH IN WASHINGTON STATE.	575,900	
Total				5,200,150	

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include Program service revenue, PRI ACCRUED INTEREST INCOME, Fees and contracts from government agencies, Membership dues and assessments, Interest on savings and temporary cash investments, Dividends and interest from securities, Net rental income, Gain or (loss) from sales of assets, and Subtotal.

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. Row 1 A: INTEREST INCOME FROM CIVICA RX - PROGRAM RELATED INVESTMENT IS USED TO PROVIDE HIGH-NEEDS POPULATIONS WITH TIMELY ACCESS TO ESSENTIAL GENERIC DRUGS AT AFFORDABLE PRICES.

Additional Data

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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.

2023

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 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
 PETER G PETERSON FOUNDATION

Employer identification number
 26-0316905

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JOAN GANZ COONEY <hr/> 888-C EIGHTH AVENUE BOX 144 <hr/> NEW YORK, NY 10019	<hr/> \$ 35,000.00	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (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
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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

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TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AUDIT & ACCOUNTING FEES	99,500	0		99,500
PROFESSIONAL TAX FEES	109,410	0		42,276

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Identifier	Return Reference	Explanation
SUMMARY OF DIRECT CHARITABLE ACTIVITIES	FORM 990-PF, PART VIII-A	<p>FOUNDATION ACTIVITIES THE PETER G. PETERSON FOUNDATION'S MISSION IS TO INCREASE PUBLIC AWARENESS OF THE NATURE AND URGENCY OF THE KEY FISCAL CHALLENGES THREATENING AMERICA'S FUTURE AND TO ACCELERATE ACTION ON THEM. TO ADDRESS THESE CHALLENGES SUCCESSFULLY, WE WORK TO BRING AMERICANS TOGETHER TO FIND AND IMPLEMENT SENSIBLE, LONG-TERM SOLUTIONS THAT TRANSCEND AGE, PARTY LINES, AND IDEOLOGICAL DIVIDES IN ORDER TO ACHIEVE REAL RESULTS. WE ADVANCE OUR MISSION THROUGH GRANT-MAKING, EDUCATION AND AWARENESS INITIATIVES, AND POLICY, RESEARCH AND ANALYSIS. IN 2014, THE FOUNDATION ESTABLISHED THE PETERSON CENTER ON HEALTHCARE, AN ORGANIZATION DEDICATED TO MAKING HIGHER QUALITY, MORE AFFORDABLE HEALTHCARE A REALITY FOR ALL AMERICANS. AS A DIVISION OF THE FOUNDATION, THE CENTER IS WORKING TO TRANSFORM U.S. HEALTHCARE INTO A HIGH-PERFORMANCE SYSTEM BY FINDING INNOVATIVE SOLUTIONS THAT IMPROVE QUALITY AND LOWER COSTS, AND ACCELERATING THEIR ADOPTION ON A NATIONAL SCALE. THE CENTER COLLABORATES WITH STAKEHOLDERS ACROSS THE HEALTHCARE SYSTEM AND ENGAGES IN GRANT- MAKING, PARTNERSHIPS, AND RESEARCH. THE FOUNDATION ALSO ENGAGES IN A RANGE OF NONPARTISAN EFFORTS TO STRENGTHEN THE DEMOCRATIC FOUNDATIONS OF THE UNITED STATES AND THE EXCHANGE OF IDEAS THAT IS REQUIRED FOR EFFECTIVE POLICYMAKING.</p>
CONTINUATION OF SUPPLEMENTARY INFORMATION	FORM 990-PF, PART XIV	<p>2A: NAME & ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED: PETER G. PETERSON FOUNDATION 888-C EIGHTH AVENUE, BOX #144 NEW YORK, NY 10019 TELEPHONE: 212-542-9200 EMAIL: INQUIRIES@PGPF.ORG INQUIRIES@PETERSONHEALTHCARE.ORG 2B: FORM AND CONTENT OF APPLICATIONS: A BRIEF DESCRIPTION OF THE PROPOSED PROJECT VIA EMAIL. 2C: ANY SUBMISSION DEADLINES: INQUIRIES ARE ACCEPTED AT ANY TIME DURING THE YEAR. 2D: RESTRICTIONS OR LIMITATIONS ON AWARDS: PETER G. PETERSON FOUNDATION GENERAL GRANT ELIGIBILITY GUIDELINES/ REQUIREMENTS: THE PETER G. PETERSON FOUNDATION - CONSIDERS GRANT REQUESTS DIRECTLY RELATED TO THE FOUNDATION'S MISSION AND PRIORITIES - GENERALLY AWARDS GRANTS TO U.S. BASED 501(C)(3) NONPROFIT ORGANIZATIONS - PREFERS TO SUPPORT ORGANIZATIONS THAT HAVE BEEN IN EXISTENCE FOR AT LEAST TWO YEARS, WITH ANNUAL OPERATING BUDGETS OF AT LEAST \$1 MILLION - SEEKS TO PARTNER WITH ORGANIZATIONS THAT HAVE THE ABILITY TO IMPLEMENT PROGRAMMING FOR NATIONAL IMPACT THE PETER G. PETERSON FOUNDATION DOES NOT PARTICIPATE IN ACTIVITIES WHICH ARE PROHIBITED FOR PRIVATE FOUNDATIONS AND DOES NOT SUPPORT INSTITUTIONS THAT DISCRIMINATE ON THE BASIS OF, AMONG OTHER THINGS, RACE, RELIGION, GENDER, NATIONAL ORIGIN, AGE, DISABILITY OR SEXUAL ORIENTATION, IN POLICY OR IN PRACTICE. IN ADDITION THE PETER G. PETERSON FOUNDATION DOES NOT GENERALLY ENGAGE IN CERTAIN OTHER PRACTICES, INCLUDING BUT NOT LIMITED TO: - FUNDING ORGANIZATIONS BASED OUTSIDE OF THE UNITED STATES - GIVING GRANTS TO INDIVIDUALS - FUNDING SOCIAL OR FRATERNAL ORGANIZATIONS - SUPPORTING CAPITAL CAMPAIGNS, AUCTIONS, AND OTHER SIMILAR ACTIVITIES - PROVIDING UNRESTRICTED FUNDING - UNDERWRITING CHAIRS, ENDOWMENTS, OR ACADEMIC SCHOLARSHIPS FOR MORE INFORMATION ON THE FOUNDATION'S GUIDELINES FOR AWARDS, APPLICANTS MAY VISIT OUR WEBSITE: WWW.PGPF.ORG</p>
3A/B	FORM 990-PF, PART XIV	<p>GRANTS/CONTRIBUTIONS PAID OR APPROVED FOR FUTURE PAYMENT: GRANTEE NAMES WITH * AFTER THE NAME ARE GRANTS MADE FROM THE PETERSON CENTER ON HEALTHCARE LLC, WHICH IS A WHOLLY OWNED SUBSIDIARY OF THE PETER G. PETERSON FOUNDATION. GRANTEE NAMES WITH ** AFTER THE NAME ARE GRANTS MADE FROM THE PETERSON HEALTH TECHNOLOGY INSTITUTE LLC, WHICH IS A WHOLLY OWNED SUBSIDIARY OF THE PETERSON CENTER ON HEALTHCARE LLC.</p>
EXPENDITURE RESPONSIBILITY	FORM 990-PF, PART VIII-B	<p>PRI RECIPIENT CIVICA, INC. 2912 W. EXECUTIVE PKWY LEHI, UT 84043 DATES AMOUNTS 10/23/2019 \$2,535,211.27 03/31/2020 \$1,470,384.50 07/25/2022 \$2,414,922.57 01/18/2023 \$2,579,481.66 ACCRUED INTEREST THROUGH 03/31/2024 \$1,325,363.00 PURPOSE PROGRAM RELATED INVESTMENT, LINE OF CREDIT - TO SUPPORT PROGRAMS, INITIATIVES AND ACTIVITIES CARRIED OUT THROUGH MEMBER HOSPITALS AND HEALTH SYSTEMS THAT PROVIDE HIGH-NEEDS POPULATIONS WITH TIMELY ACCESS TO ESSENTIAL GENERIC DRUGS AT AFFORDABLE PRICES. HIGH-NEEDS POPULATIONS INCLUDE POPULATIONS IN THE FEDERAL GOVERNMENT'S 340B PROGRAM FOR DISCOUNTED DRUG PRICING FOR UNINSURED AND LOW-INCOME INDIVIDUALS. THIS POPULATION INCLUDES UNINSURED PATIENTS, PATIENTS AT OR BELOW 150% OF POVERTY LEVELS, PATIENTS WITH HIGH HEALTH CARE SPENDING (E.G., TOP 10%) AND IMPOVERISHED OR OTHERWISE VULNERABLE OR DISADVANTAGED PATIENTS SUCH AS THE DISABLED, THE FRAIL ELDERLY, AND THOSE WITH MULTIPLE CHRONIC CONDITIONS. AMOUNTS EXPENDED \$2,371,719 DATES OF REPORTS AUDITED FINANCIAL STATEMENTS AS OF 12/31/2019 DATED 4/20/2020, AS OF 12/31/2020 DATED 10/29/2021, AS OF 12/31/2021 DATED 5/16/2022, AS OF 12/31/2022 DATED 3/24/2023, AND AS OF 12/31/2023 DATED 4/15/2024. GRANTEE REPORTS DATED 4/10/2020, 6/12/2020, 12/14/2021, 6/10/2022, 3/27/2023, 3/5/2024 DIVERSION OF FUNDS TO THE KNOWLEDGE OF THE GRANTOR, NO FUNDS HAVE BEEN DIVERTED. VERIFICATION THE GRANTOR HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORTS FROM THE PRI RECIPIENT; THEREFORE, NO INDEPENDENT VERIFICATION OF THE REPORTS WAS MADE.</p>

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EDITAS MEDICINE INC	163,797	163,797

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

**US Government Securities - End of
Year Book Value:**

166,266,859

**US Government Securities - End of
Year Fair Market Value:**

166,266,859

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2023 IRS 990 e-File Render**Name:** PETER G PETERSON FOUNDATION**EIN:** 26-0316905

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ABRAMS CAPITAL PARTNERS II, LP	FMV	2,487,185	2,487,185
ACACIA PROPERTY CORPORATION 2022	FMV	1,821,321	1,821,321
ACE REDPOINT OPPORTUNITY CHINA, LP	FMV	783,774	783,774
ACE REDPOINT VENTURES CHINA II, LP	FMV	2,527,509	2,527,509
ACE REDPOINT VENTURES CHINA III, LP	FMV	521,015	521,015
ACTIVUM SG FEEDER FUND V LP	FMV	7,303,208	7,303,208
ALLOCATED AND UNALLOCATED GOLD	FMV	39,164,072	39,164,072
ALTAS PARTNERS HOLDINGS (A) LP	FMV	8,586,573	8,586,573
ALTAS PARTNERS HOLDINGS II LP	FMV	13,026,492	13,026,492
ALTAS PARTNERS HOLDINGS III LP	FMV	1,382,125	1,382,125
AMANSA FEEDER, LTD	FMV	34,429,732	34,429,732
AMERICAN SECURITIES PARTNERS VI, LP	FMV	6,391,125	6,391,125
APH ST. AUGUSTINE HOLDINGS (A) LP	FMV	1,016,626	1,016,626
ARROWSTREET CAPITAL GLOBAL EQUITY ALPHA EXTENSION FUND LIMITED	FMV	62,014,634	62,014,634
ARTEMIS REAL ESTATE PARTNERS FUND II, LP	FMV	1,037,987	1,037,987
AXON PARTNERS (OFFSHORE), LTD (F/K/A TPG)	FMV	99,387	99,387
BAUPOST VALUE PARTNERS, LP - IV	FMV	8,549,197	8,549,197
BOND III, LP	FMV	808,335	808,335
BROOKSIDE CAYMAN, LIMITED	FMV	14	14
CANTILLON GLOBAL EQUITY LP	FMV	79,441,701	79,441,701
CENTERBRIDGE CREDIT PARTNERS TE, LP	FMV	260,765	260,765
CYRUS OPPORTUNITIES FUND II, LTD	FMV	10,901,400	10,901,400
CYRUS SELECT OPPORTUNITIES FUND, LTD	FMV	16,204,402	16,204,402
CYRUS SELECT OPPORTUNITIES MASTER FUND II, LTD	FMV	10,571,301	10,571,301
DENHAM COMMODITY PARTNERS FUND VI-A LP	FMV	5,009,937	5,009,937
DRAGONEER GLOBAL OFFSHORE FEEDER II, LP	FMV	9,874,557	9,874,557
ECHO STREET GOODCO SELECT II, LP	FMV	498,765	498,765
ELLIOTT INTERNATIONAL LIMITED	FMV	59,267,225	59,267,225
ENCAP ENERGY CAPITAL FUND IX, LP	FMV	1,159,723	1,159,723
ENCAP ENERGY CAPITAL FUND VIII-B, LP	FMV	3,194,394	3,194,394
ENCAP ENERGY CAPITAL FUND X, LP	FMV	4,599,191	4,599,191
ENCAP ENERGY CAPITAL FUND XI, LP	FMV	8,128,305	8,128,305
ENCAP FLATROCK MIDSTREAM FUND III, LP	FMV	4,825,791	4,825,791
ENCAP FLATROCK MIDSTREAM FUND IV, LP	FMV	4,329,706	4,329,706
FARALLON CAPITAL INSTITUTIONAL PARTNERS, LP	FMV	67,851,198	67,851,198
FELICIS FOCUS FUND I, LP	FMV	1,219,556	1,219,556
FELICIS VENTURES IX, LP	FMV	1,395,343	1,395,343
FELICIS VENTURES VII, LP	FMV	4,173,071	4,173,071
FELICIS VENTURES VIII, LP	FMV	3,100,222	3,100,222
FINEPOINT CAPITAL PARTNERS II, LP	FMV	446,608	446,608
FOLIUM AGRICULTURE FUND I PARALLEL-1 LP	FMV	11,681,201	11,681,201
FOLIUM TIMBER FUND I PARALLEL-1 LP	FMV	11,150,230	11,150,230

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
FORTRESS CREDIT OPPORTUNITIES FUND (B) LP	FMV	131,715	131,715
FPA APARTMENT OPPORTUNITY FUND VI-A, LP	FMV	2,553,936	2,553,936
FPA APARTMENT OPPORTUNITY FUND VII-A, LP	FMV	8,077,333	8,077,333
FPA APARTMENT OPPORTUNITY FUND VIII-A, LP	FMV	4,277,072	4,277,072
FPV FUND I, LP	FMV	1,694,333	1,694,333
GA RV (CLASS A) CONTINUATION, LP	FMV	2,003,499	2,003,499
GAOLING FEEDER, LTD	FMV	17,303	17,303
GARRISON REAL ESTATE FUND III LP	FMV	647,859	647,859
GENERAL ATLANTIC INVESTMENT PARTNERS I, LP	FMV	1,439,095	1,439,095
GOLDMAN SACHS VINTAGE FUND V (OFFSHORE), LP	FMV	273,798	273,798
GOODWATER CAPITAL III, LP	FMV	4,285,186	4,285,186
GOODWATER CAPITAL IV, LP	FMV	1,943,850	1,943,850
GOODWATER INFINITY II, LP	FMV	2,963,526	2,963,526
GSO SPECIAL SITUATIONS OVERSEAS FUND LTD	FMV	51,064	51,064
H CAPITAL V, LP	FMV	5,368,598	5,368,598
HIGHBROOK INCOME PROPERTY FUND II, LP	FMV	270,214	270,214
HIGHBROOK INCOME PROPERTY FUND III, LP	FMV	4,188,266	4,188,266
HUNTER POINT CAPITAL INVESTORS (OFFSHORE), LP	FMV	2,615,201	2,615,201
ICHIGO JAPAN FUND B	FMV	33,553,905	33,553,905
LCP VII (OFFSHORE), LP	FMV	475,507	475,507
LERER HIPPEAU SELECT FUND IV, LP	FMV	494,730	494,730
LERER HIPPEAU VIII, LP	FMV	684,243	684,243
LUMINATE CAPITAL PARTNERS II, LP	FMV	10,557,753	10,557,753
LUMINATE CAPITAL PARTNERS III, LP	FMV	7,440,455	7,440,455
MENLO SPECIAL OPPORTUNITIES III ACCESS LLC	FMV	1,465,699	1,465,699
NEXUS SPECIAL SITUATIONS II, LP	FMV	3,312,705	3,312,705
NEXUS SPECIAL SITUATIONS III, LP	FMV	6,413,889	6,413,889
NGP NATURAL RESOURCES X, LP	FMV	842,562	842,562
NUT TREE DRAWDOWN OFFSHORE FUND, LP	FMV	10,189,755	10,189,755
PROVIDENCE STRATEGIC GROWTH II-A LP	FMV	8,056,323	8,056,323
PROVIDENCE STRATEGIC GROWTH III-A LP	FMV	9,883,122	9,883,122
PROVIDENCE STRATEGIC GROWTH IV LP	FMV	11,316,497	11,316,497
PSG V LP	FMV	7,369,466	7,369,466
REDWOOD DRAWDOWN OFFSHORE FUND II, LP	FMV	2,266,115	2,266,115
RIVA CAPITAL PARTNERS III, LP	FMV	566,888	566,888
ROARK CAPITAL PARTNERS IV LP	FMV	8,338,187	8,338,187
ROARK CAPITAL PARTNERS V (TE) LP	FMV	9,859,278	9,859,278
ROTHWELL VENTURES I, LP	FMV	6,245,644	6,245,644
SDC DIGITAL INFRASTRUCTURE OPPORTUNITY FUND II, LP	FMV	15,030,383	15,030,383
SDC DIGITAL INFRASTRUCTURE OPPORTUNITY FUND III, LP	FMV	5,423,262	5,423,262
SERENITY INVESTMENT FEEDER FUND LIMITED	FMV	11,247,863	11,247,863
THE CHILDREN'S INVESTMENT FUND	FMV	54,206,400	54,206,400
TRIDENT V, LP	FMV	1,429,738	1,429,738
WARBURG PINCUS CHINA, LP	FMV	6,072,163	6,072,163
WARBURG PINCUS CHINA-SOUTHEAST ASIA II, LP	FMV	4,635,956	4,635,956

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WARBURG PINCUS FINANCIAL SECTOR, LP	FMV	8,714,982	8,714,982
WARBURG PINCUS GLOBAL GROWTH 14, LP	FMV	3,691,426	3,691,426
WARBURG PINCUS GLOBAL GROWTH, LP	FMV	10,358,926	10,358,926
WARBURG PINCUS PRIVATE EQUITY XII, LP	FMV	7,809,934	7,809,934
WELSH, CARSON, ANDERSON & STOWE XI, LP	FMV	490,901	490,901
WHALE ROCK FLAGSHIP FUND LTD	FMV	19,602,879	19,602,879
WHITE DEER ENERGY LP II	FMV	1,357,383	1,357,383
WNDRCO HOLDINGS II LP	FMV	839,940	839,940

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	776,732	0		448,623

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SOFTWARE/DIGITAL	24,033	21,168	21,168
DIVIDEND/OTHER RECEIVABLE	137,366	964,031	964,031
457(F) PLAN ASSET	303,995	288,178	288,178
PROGRAM RELATED INVESTMENT	9,000,000	9,000,000	9,000,000
PRI INTEREST RECEIVABLE	821,805	1,325,363	1,325,363

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MEDIA AND ADVERTISING	1,555,822	0		1,614,779
OTHER PROGRAM EXPENSES	6,851,892	0		7,169,367
OTHER MISCELLANEOUS EXPENSES	454,903	0		439,284
K-1 OTHER PORTFOLIO DEDUCTIONS	0	54,872		0
K-1 INVESTMENT INTEREST EXPENSE	0	980,027		0
K-1 OTHER DEDUCTIONS	0	5,813,817		0
K-1 ROYALTY DEDUCTIONS	0	165,866		0

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP - ORDINARY TRADE/BUSINESS		1,714,349	
PARTNERSHIP - ROYALTY INCOME		955,451	
PARTNERSHIP - OTHER PORTFOLIO INCOME		-217,751	
PARTNERSHIP - OTHER INCOME		155,297	
PARTNERSHIP - CANCELLATION OF DEBT		276	
OTHER INCOME FROM SECURITIES		38,747	
PRI ACCRUED INTEREST INCOME	503,558	503,558	503,558
OTHER REVENUE	1,031	1,031	1,031

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Description	Amount
PRIOR YEAR GRANTS RECOVERED	527,819
UNREALIZED GAIN - INVESTMENTS	92,613,053

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED EXCISE TAX	2,816,289	3,716,805
457(F) PLAN LIABILITY	303,994	288,178

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COMMUNICATIONS	63,000	0		63,000
OTHER PROFESSIONAL FEES	212,988	0		212,988
HUMAN RESOURCES	633,335	0		606,257
INFORMATION TECHNOLOGY	1,220,051	0		1,224,413
INVESTMENT MANAGEMENT	2,374,692	2,374,692		0

TY 2023 IRS 990 e-File Render

Name: PETER G PETERSON FOUNDATION

EIN: 26-0316905

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX EXPENSE	1,629,803	0		0
PARTNERSHIP - FOREIGN TAXES	0	325,652		0