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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052
2009

For calendar year 2009, or tax year beginning 07-01-2009 , and ending 06-30-2010

G

Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE JACKSON FOUNDATION 97305070		A Employer identification number 93-6020752	
	Number and street (or P O box number if mail is not delivered to street address) P O BOX 3168		Room/suite	B Telephone number (see page 10 of the instructions) (503) 275-4327
	City or town, state, and ZIP code PORTLAND, OR 97208		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 11,288,163		J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _ (Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	11	11		
	4 Dividends and interest from securities.	287,400	287,400		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-501,676			
	b Gross sales price for all assets on line 6a _____ 2,142,562				
	7 Capital gain net income (from Part IV , line 2)		0		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-214,265	287,411		
	13 Compensation of officers, directors, trustees, etc	141,042	70,521		70,521
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)	100	0	0	100
	b Accounting fees (attach schedule)	1,500	0	0	1,500
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see page 14 of the instructions)	2,263			0
	19 Depreciation (attach schedule) and depletion . . .	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	4,517			3,118
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	149,422	70,521	0	75,239
	25 Contributions, gifts, grants paid	423,752			423,752
	26 Total expenses and disbursements. Add lines 24 and 25	573,174	70,521	0	498,991
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-787,439			
	b Net investment income (if negative, enter -0-)		216,890		
	c Adjusted net income (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	38,998	85,798	85,798
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	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 page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____ 0			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	7,656,373	7,598,278	6,327,583
	c	Investments—corporate bonds (attach schedule).	5,679,868	4,903,724	4,874,782
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			0
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	13,375,239	12,587,800	11,288,163	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	13,375,239	12,587,800	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	13,375,239	12,587,800	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	13,375,239	12,587,800	

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1 13,375,239
2	Enter amount from Part I, line 27a	2 -787,439
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 12,587,800
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 30	6 12,587,800

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table		
b			
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	See Additional Data Table		
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-501,676
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 pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	472,541	10,438,086	0 045271
2007	805,619	14,029,964	0 057421
2006	672,144	13,913,948	0 048307
2005	603,788	13,338,502	0 045267
2004	583,587	12,790,410	0 045627

2	Total of line 1, column (d).	2	0 241893
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 048379
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	11,505,316
5	Multiply line 4 by line 3.	5	556,611
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,169
7	Add lines 5 and 6.	7	558,780
8	Enter qualifying distributions from Part XII, line 4.	8	498,991

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	4,338
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3		Add lines 1 and 2.		3	4,338
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	4,338
6		Credits/Payments			
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a	4,159	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	0	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	4,159
8		Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	0
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	179
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11		Enter the amount of line 10 to be Credited to 2010 estimated tax <input type="checkbox"/>	Refunded <input type="checkbox"/>	11	0

Part VII-AStatements 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?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	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?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
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	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
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?	6	Yes	
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 XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> OR _____			
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 .	8b	Yes	
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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of US BANK Telephone no (503) 275-4327			
Located at 555 SW OAK PORTLAND OR ZIP+4 97204				
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	

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?		Yes	No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?		Yes	No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?		Yes	No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		Yes	No
(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)?		Yes	No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).		Yes	No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	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 2009?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? 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 page 20 of the instructions).	2b		No
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 2009 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 2009.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.			5b
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>			6b
				No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			7b

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the 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
US BANK	CO-TRUSTEE	130,542		
PO BOX 3168	1			
PORTLAND, OR 97208				
JULIE VIGELAND	CO-TRUSTEE	12,000		
900 SW 5TH AVE STE 2300	1			
PORTLAND, OR 97204				
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the 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 VIII

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

3 Five highest-paid independent contractors for professional services (see page 23 of the 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 IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	11,645,488
b	Average of monthly cash balances.	1b	35,036
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	11,680,524
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	11,680,524
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	175,208
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	11,505,316
6	Minimum investment return. Enter 5% of line 5.	6	575,266

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	575,266
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	4,338
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,338
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	570,928
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	570,928
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	570,928

Part XII

Qualifying Distributions (see page 25 of the 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	498,991
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	498,991
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	498,991
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				570,928
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only.			0	
b Total for prior years 2007 , 20____ , 20____		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004.				0
b From 2005.				0
c From 2006.				0
d From 2007.				76,917
e From 2008.				0
f Total of lines 3a through e.	76,917			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 498,991				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2009 distributable amount.				498,991
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	71,937			71,937
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,980			
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 page 27 of the instructions . . .		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	4,980			
10 Analysis of line 9				
a Excess from 2005.				0
b Excess from 2006.				0
c Excess from 2007.				4,980
d Excess from 2008.				0
e Excess from 2009.				0

Part XIVPrivate Operating Foundations (see page 27 of the instructions and Part VII-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 2009, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the 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. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

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

THE JACKSON FOUNDATION ATTN MR R
PO BOX 3168
PORTLAND,OR 97208
(503) 275-6564

b

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

A FORMAL APPLICATION IS AVAILABLE ON REQUEST GRANTS ARE MADE ONLY TO 501(C)(3) NON-PRIVATE FOUNDATIONS WHOSE EXEMPTION LETTER SHOWS THEM TO BE OREGON ORGANIZATIONS

c

Any submission deadlines

APPLICATIONS MAY BE SUBMITTED AT ANYTIME AND WILL BE REVIEWED AT A SPRING, FALL AND WINTER MEETING

d

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

FUNDS REQUESTED FOR GENERAL OPERATING PURPOSES, STAFF SALARIES AND THE LIKE DO NOT GENERALLY HAVE THE SAME PRIORITY THAT FUNDS FOR ONE-TIME, SPECIAL PROJECTS OR DEVELOPMENTAL PROJECTS ENJOY

Part XV

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 Paid during the year See Additional Data Table				
Total			▶ 3a	423,752
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

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

1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge					
	<div> <div>*****</div> <div>Signature of officer or trustee</div> </div>		<div> <div>2010-10-26</div> <div>Date</div> </div>		<div> <div>*****</div> <div>Title</div> </div>	
	Paid Preparer's Use Only	<div> <div>Preparer's Signature</div> <div></div> </div>		<div> <div>Date</div> <div></div> </div>		<div> <div>Check if self-employed <input type="checkbox"/></div> <div>Preparer's identifying number (see Signature on page 30 of the instructions)</div> </div>
		<div> <div>Firm's name (or yours if self-employed), address, and ZIP code</div> <div></div> </div>		<div> <div>EIN <input type="checkbox"/></div> <div></div> </div>		
			<div> <div>Phone no</div> <div></div> </div>			

Additional Data

Software ID: 09000072

Software Version: 09-0

EIN: 93-6020752

Name: THE JACKSON FOUNDATION 97305070

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
11402 509 EATON VANCE LARGE CAP VALUE CLA		2006-05-03	2010-03-18
6743 088 FIDELITY ADV DIVERSIFIED INTL CL A		2010-03-18	2010-06-15
64175 037 FIDELITY ADV DIVERSIFIED INTL CL A		2005-05-18	2010-06-15
5912 334 FIRST AMERICAN INTERMD TERM BD FD Y		2003-05-12	2009-08-24
1206 03 FIRST AMERICAN INTERMD TERM BD FD Y		2003-05-12	2009-09-21
7944 389 FIRST AMERICAN INTERMD TERM BD FD Y		2003-05-12	2009-12-04
39138 943 FIRST AMERICAN INTERMD TERM BD FD Y		2003-05-12	2010-03-18
19646 365 FIRST AMERICAN INTERMD TERM BD FD Y		2003-05-12	2010-06-15
1845 018 LAUDUS ROSEN INTL S C FD CL INV		2006-05-03	2010-05-14
18609 527 LAUDUS ROSEN INTL S C FD CL INV		2006-05-03	2010-06-15
LUCENT TECHNOLOGIES INC			2010-03-16


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
200,000		223,777	-23,777
92,245		100,000	-7,755
877,915		1,094,318	-216,403
58,000		62,139	-4,139
12,000		12,675	-675
80,000		83,496	-3,496
400,000		411,350	-11,350
200,000		206,483	-6,483
20,000		40,590	-20,590
201,727		409,410	-207,683
33			33


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-23,777
			-7,755
			-216,403
			-4,139
			-675
			-3,496
			-11,350
			-6,483
			-20,590
			-207,683
			33


Form 990PF Part XV Line 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 Paid during the year				
ALBERTINA KERR424 NE 22ND AVENUE PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	1,500
ADELANTE MUJERES2420 19TH AVE FOREST GROVE,OR 97116	NONE	PUBLIC	GENERAL SUPPORT	1,000
AMERICAN RED CROSS OREGON TRAIL CHAPO BOX 3200 PORTLAND,OR 97208	NONE	PUBLIC	GENERAL SUPPORT	1,500
ARTISTS REPERTORY THEATRE 1515 SW WASHINGTON PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	2,500
BRADLEY-ANGLE HOUSE4548 NORTH ALBINA AVENUE SUITE 101 PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	3,000
BIRCH COMMUNITY SERVICES INC 17780 NE SAN RAFAEL PORTLAND,OR 97230	NONE	PUBLIC	GENERAL SUPPORT	5,000
BETHEL LUTHERAN CHURCH YOUTH DROP IN CENTER5658 N DENVER AVENUE PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	1,000
BOYS AND GIRLS AID SOCIETY018 SW BOUNDARY COURT PORTLAND,OR 97239	NONE	PUBLIC	GENERAL SUPPORT	1,500
BOYS AND GIRLS CLUBS OF PORTLAND METROPOLITAN AREAPO BOX 820127 PORTLAND,OR 97282	NONE	PUBLIC	GENERAL SUPPORT	6,000
BIENESTAR220 SE 12TH AVENUE SUITE A-100 HILLSBORO,OR 97123	NONE	PUBLIC	GENERAL SUPPORT	1,500
THE BROADWAY ROSE THEATRE COMPANYPO BOX 231004 TIGARD,OR 97281	NONE	PUBLIC	GENERAL SUPPORT	1,000
CALDERA224 NW 13TH AVENUE SUITE 304 PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	1,000
CASCADE AIDS PROJECTS208 SW 5TH AVE STE 800 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	1,500
COALITION OF COMMUNITY HEALTH CLINIC619 SW 11TH AVENUE SUITE 225 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,000
CATHOLIC CHARITIES IN OREGON 231 SE 12TH AVENUE PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	7,500
Total  3a				423,752


Form 990PF Part XV Line 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 Paid during the year				
CENTRO CULTURAL OF WASHINGTON CNTY1110 N ADAIR STREET CORNELIUS,OR 97113	NONE	PUBLIC	GENERAL SUPPORT	1,000
CASA FOR CHILDREN1401 NE 68TH AVENUE PORTLAND,OR 97213	NONE	PUBLIC	GENERAL SUPPORT	4,500
CENTER FOR EARTH LEADERSHIP 319 SW WASHINGTON ST 400 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	3,500
CHESS FOR SUCCESS2701 NW VAUGHN SUITE 101 PORTLAND,OR 97210	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE CHILDRENS BOOK BANK2680 SW RAVENSVIEW DRIVE PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	1,000
CHILD CENTERED SOLUTIONS808 SW 15TH AVENUE PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
CRATER LAKE NATIONAL PARK TRUSTPO BOX 62 CRATER LAKE,OR 97604	NONE	PUBLIC	GENERAL SUPPORT	2,000
COLUMBIA RIVER MARITIME MUSEUM1792 MARINE DRIVE ASTORIA,OR 97103	NONE	PUBLIC	GENERAL SUPPORT	5,000
COMMUNITY PARTNERS FOR AFFORDABLE HOUSINGPO BOX 23206 TIGARD,OR 97281	NONE	PUBLIC	GENERAL SUPPORT	1,000
CHILDREN'S RELIEF NURSERY8425 N LOMBARD STREET PORTLAND,OR 97203	NONE	PUBLIC	GENERAL SUPPORT	2,500
COMMUNITY TRANSITIONAL SCHOOL5441 SE BELMONT ST PORTLAND,OR 97215	NONE	PUBLIC	GENERAL SUPPORT	5,000
CONCORDIA UNIVERSITY2811 NE HOLMAN STREET PORTLAND,OR 97211	NONE	PUBLIC	SCHOLARSHIP	7,500
CAMPFIRE USA PORTLAND METRO COUNCIL619 SW 11TH AVENUE SUITE 200 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE DOUGY CENTERPO BOX 86852 PORTLAND,OR 97286	NONE	PUBLIC	GENERAL SUPPORT	3,500
DE LA SALLE NORTH CATHOLIC HIGH SCHOOL7528 N FENWICK AVENUE PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	2,500
Total  3a				423,752


Form 990PF Part XV Line 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 Paid during the year				
DRESS FOR SUCCESS1532 NE 37TH AVE PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE ESSENTIAL HEALTH CLINIC 266 W MAIN MS 68 HILLSBORO, OR 97123	NONE	PUBLIC	GENERAL SUPPORT	2,000
ECUMENICAL MINISTRIES OF OREGON0245 SW BANCROFT STREET PORTLAND, OR 97239	NONE	PUBLIC	GENERAL SUPPORT	2,000
FRIENDS OF THE COLUMBIA GORGE522 SW 5TH AVE STE 720 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	1,500
FRIENDS OF THE CHILDREN-PORTLAND44 NE MORRIS PORTLAND, OR 97212	NONE	PUBLIC	GENERAL SUPPORT	2,500
FINANCIAL BEGINNINGS7327 SW BARNES ROAD 213 PORTLAND, OR 97225	NONE	PUBLIC	GENERAL SUPPORT	1,000
FRIENDS OF SATURDAY ACADEMY 830 SW 10TH ST SUITE 200 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	4,000
FRIENDLY HOUSE INC2617 NW SAVIER PORTLAND, OR 97210	NONE	PUBLIC	GENERAL SUPPORT	2,500
FRIENDS OF TRYON CREEK11321 SW TERWILLIGER BLVD PORTLAND, OR 97236	NONE	PUBLIC	GENERAL SUPPORT	1,500
GROWING GARDENS2003 NE 42ND AVENUE 3 PORTLAND, OR 97213	NONE	PUBLIC	GENERAL SUPPORT	2,500
HIGH DESERT MUSEUM59800 S HIGHWAY 97 BEND, OR 97702	NONE	PUBLIC	GENERAL SUPPORT	1,500
HUMAN SOLUTIONS INC12350 SE POWELL BLVD PORTLAND, OR 97236	NONE	PUBLIC	GENERAL SUPPORT	4,000
I HAVE A DREAM FOUNDATION OREGON1478 NE KILLINGSWORTH ST 1ST FLOOR PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	7,500
INTERVARSITY CHRISTIAN FELLOWSHIP7039 NE RODNEY COURT PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,000
JANUS YOUTH PROGRAMS INC707 NE COUCH STREET PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	1,500
Total  3a				423,752


Form 990PF Part XV Line 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 Paid during the year				
JAPANESE GARDEN SOCIETY OF OREGONPO BOX 3847 PORTLAND, OR 97208	NONE	PUBLIC	GENERAL SUPPORT	1,000
JOIN3338 SE 17TH AVE PORTLAND, OR 97202	NONE	PUBLIC	GENERAL SUPPORT	3,000
JOURNAL OF PUB WELFARE FD C/O US BANKPO BOX 3168 PORTLAND, OR 97208	NONE	PUBLIC	GENERAL SUPPORT	5,020
JUVENILE RIGHTS PROJECT401 NE 19TH AVENUE SUITE 200 PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	1,500
LITERARY ARTS INC224 NW 13TH AVENUE SUITE 106 PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	1,500
LAN SU CHINESE GARDENPO BOX 3706 PORTLAND, OR 97208	NONE	PUBLIC	GENERAL SUPPORT	5,000
LOAVES & FISHES CENTERS INC 7710 SW 31ST STREET PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	3,500
LIVING HOPE INTERNATIONAL 4035 SE 82ND AVE PORTLAND, OR 97266	NONE	PUBLIC	GENERAL SUPPORT	1,000
THE LIBRARY FOUNDATION522 SW FIFTH AVENUE SUITE 1025 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	7,000
METROPOLITAN FAMILY SERVICE 1808 SE BELMONT STREET PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,500
MORRISON CHILD & FAMILY SERVICES9911 SE MT SCOTT BLVD PORTLAND, OR 97266	NONE	PUBLIC	GENERAL SUPPORT	4,500
MIRACLE THEATRE GROUP415 SE SIXTH AVENUE PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,000
MEDICAL TEAMS INTERNATIONAL PO BOX 10 PORTLAND, OR 97207	NONE	PUBLIC	GENERAL SUPPORT	6,000
NATIONAL FOREST FOUNDATION 805 SW BROADWAY SUITE 2100 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
NEW AVENUES FOR YOUTH1220 SW COLUMBIA STREET PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	5,000
Total  3a				423,752


Form 990PF Part XV Line 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 Paid during the year				
NORTHWEST CHILDRENS THEATER & SCHOOL1819 NW EVERETT STREET SUITE 216 PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	1,000
NORTHWEST EARTH INSTITUTE107 SE WASHINGTON ST SUITE 235 PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,500
NEIGHBORHOOD HOUSE7780 SW CAPITOL HWY PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	1,500
NORTHWEST PROFESSIONAL DANCE PROJECTPO BOX 42488 PORTLAND, OR 97242	NONE	PUBLIC	GENERAL SUPPORT	1,000
NW CENTER FOR EDUCATIONAL OPTIONS10121 SE SUNNYSIDE ROAD SUITE 329 CLACKAMAS, OR 97015	NONE	PUBLIC	GENERAL SUPPORT	1,500
OREGON BALLET THEATRE818 SE SIXTH AVENUE PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	10,000
OREGON COLLEGE OF ART & CRAFT8245 SW BARNES ROAD PORTLAND, OR 97225	NONE	PUBLIC	GENERAL SUPPORT	1,000
OREGON COMMUNITY FDN1221 SW YAMHILL ST SUITE 100 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	10,732
OREGON CHILDREN'S FOUNDATION219 NW 12TH AVENUE SUITE 203 PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	12,000
OREGON CHILDREN'S THEATRE600 SW 10TH AVENUE SUITE 313 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
OREGON ENVIRONMENTAL COUNCIL222 NW DAVIS 309 PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	1,000
OUR HOUSE OF PORTLAND2727 SE ALDER PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	14,000
OREGON HEALTH-SCIENCE UNIVERSITY FD1121 SW SALMON STREET SUITE 100 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,000
OREGON HUMANITIES812 SE WASHINGTON STREET SUITE 225 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
OREGON INDEPENDENT COLLEGES FOUNDATIONPO BOX 23 MARYLHURST, OR 97036	NONE	PUBLIC	GENERAL SUPPORT	1,500
Total  3a				423,752

Form 990PF Part XV Line 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 Paid during the year				
OREGON MENTORS1221 SW YAMHILL PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	2,000
OREGON MARITIME MUSEUM115 SE ASH STREET SUITE 400C PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	1,500
OREGON NATURAL DESERT ASSOCIATION33 NW IRVING AVENUE BEND, OR 97701	NONE	PUBLIC	GENERAL SUPPORT	1,000
OREGON PUBLIC BROADCASTING 7140 SW MACADAM AVENUE PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE OREGON ZOO FOUNDATION 4001 SW CANYON ROAD PORTLAND, OR 97221	NONE	PUBLIC	GENERAL SUPPORT	2,500
OREGON SYMPHONY921 SW WASHINGTON STE 200 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	10,000
OREGON SHAKESPEARE FESTIVAL PO BOX 158 ASHLAND, OR 97520	NONE	PUBLIC	GENERAL SUPPORT	7,000
PORTLAND ART MUSEUM1219 SW PARK AVENUE PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	12,000
PETER BRITT GARDENS MUSIC & ART FESTIVAL ASSOCIATIONPO BOX 1124 MEDFORD, OR 97501	NONE	PUBLIC	GENERAL SUPPORT	1,000
PORTLAND BAROQUE ORCHESTRA 1020 SW TAYLOR SUITE 275 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,500
PROVIDENCE CHILD CENTER FOUNDATION830 NE 47TH AVENUE PORTLAND, OR 97213	NONE	PUBLIC	GENERAL SUPPORT	2,000
PORTLAND CHILDREN'S MUSEUM 4015 SW CANYON ROAD PORTLAND, OR 97221	NONE	PUBLIC	GENERAL SUPPORT	4,000
PORTLAND CENTER STAGE128 NW 11TH AVENUE PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	12,500
PENINSULA CHILDREN'S CENTER 4720 N MARYLAND AVENUE PORTLAND, OR 97217	NONE	PUBLIC	GENERAL SUPPORT	1,500
PORTLAND FESTIVAL SYMPHONY PO BOX 585 PORTLAND, OR 97207	NONE	PUBLIC	GENERAL SUPPORT	500
Total  3a				423,752


Form 990PF Part XV Line 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 Paid during the year				
PORTLAND FRUIT TREE PROJECT 1912 NE KILLINGSWORTH ST PORTLAND, OR 97292	NONE	PUBLIC	GENERAL SUPPORT	1,000
PORTLAND IMPACTPO BOX 33530 PORTLAND, OR 97292	NONE	PUBLIC	GENERAL SUPPORT	1,500
PICA224 NW 13TH AVENUE 305 PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	1,000
PORTLAND OPERA ASSOCIATION 211 SE CARUTHERS STREET PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	10,000
PORT ORFORD OCEAN RESOURCE TEAM2040 SE MARINE SCIENCE DR NEWPORT, OR 97365	NONE	PUBLIC	GENERAL SUPPORT	2,500
PLANNED PARENTHOOD OF THE COLUMBIA WILLAMETTE3231 SE 50TH AVENUE PORTLAND, OR 97206	NONE	PUBLIC	GENERAL SUPPORT	7,500
PORTLAND RESCUE MISSION700 NE MULTNOMAH SUITE 400 PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
PORTLAND SYMPHONIC CHOIRPO BOX 1517 PORTLAND, OR 97207	NONE	PUBLIC	GENERAL SUPPORT	1,000
PORTLAND STATE UNIVERSITY FOUNDATIONPO BOX 751-ORCC PORTLAND, OR 97207	NONE	PUBLIC	GENERAL SUPPORT	15,000
PROFILE THEATRE PROJECTPO BOX 14845 PORTLAND, OR 97293	NONE	PUBLIC	GENERAL SUPPORT	4,000
PORTLAND YOUTH PHILHARMONIC 421 SW SIXTH AVENUE SUITE 1350 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	1,000
REACH COMMUNITY DEVELOPMENT INC1135 SE SALMON STREET PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,500
RETURNING VETERANS RESOURCE PROJECT907 NE THOMPSON PORTLAND, OR 97207	NONE	PUBLIC	GENERAL SUPPORT	1,000
ST ANDREW LEGAL CLINIC807 NE ALBERTA STREET PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,500
THE SALVATION ARMY WESTERN TERRITORY WOMENS & CHILDRENS SHELTE1712 NE SANDY BLVD PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,000
Total  3a				423,752

Form 990PF Part XV Line 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 Paid during the year				
SAVE THE PT BOAT INCPO BOX 13422 PORTLAND, OR 97213	NONE	PUBLIC	GENERAL SUPPORT	2,500
SERENDIPITY CENTER INC14815 SE DIVISION PORTLAND, OR 97292	NONE	PUBLIC	GENERAL SUPPORT	5,000
STORE TO DOORPO BOX 4665 PORTLAND, OR 97208	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE SHADOW PROJECT6663 SW BEAVERTON HILLSDALE HWY 108 PORTLAND, OR 97225	NONE	PUBLIC	GENERAL SUPPORT	1,500
SNOW CAPPO BOX 160 FAIRVIEW, OR 97024	NONE	PUBLIC	GENERAL SUPPORT	1,500
SOJOURN THEATRE215 SE 9TH AVENUE SUITE 104 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,000
SOLV5193 NE ELAM YOUNG PARKWAY SUITE B HILLSBORO, OR 97124	NONE	PUBLIC	GENERAL SUPPORT	2,500
SISTERS OF THE ROAD INC133 NW SIXTH AVENUE PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	4,500
SCHOOLHOUSE SUPPLIES2735 NE 82ND AVENUE PORTLAND, OR 97220	NONE	PUBLIC	GENERAL SUPPORT	3,000
ST ANDREW'S CATHOLIC CHURCH 806 NE ALBERTA PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	5,000
STAND FOR CHILDREN516 SE MORRISON ST PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,500
THIRD ANGLE NEW MUSIC ENSEMBLE4839 NE MLK BLVD STE 204 PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,500
THE FRESHWATER TRUST65 SW YAMHILL STREET SUITE 200 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	2,000
TEARS OF JOY THEATRE323 NE WYGANT STREET 201 PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,500
TUCKER-MAXON ORAL SCHOOL 2860 SE HOLGATE PORTLAND, OR 97202	NONE	PUBLIC	GENERAL SUPPORT	3,500
Total ▶ 3a				423,752

Form 990PF Part XV Line 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 Paid during the year				
THIRD RAIL REPERTORY THEATRE PO BOX 82389 PORTLAND, OR 97202	NONE	PUBLIC	GENERAL SUPPORT	1,000
UNIVERSITY OF OREGON FOUNDATION360 E 10TH AVENUE SUITE 202 EUGENE, OR 97401	NONE	PUBLIC	GENERAL SUPPORT	15,000
WRITE AROUND PORTLAND917 SW OAK STREET SUITE 406 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	500
WHITE BIRD5620 SW EDMONT PLACE PORTLAND, OR 97239	NONE	PUBLIC	GENERAL SUPPORT	2,000
WORLD FORESTRY CENTER4033 SW CANYON ROAD PORTLAND, OR 97221	NONE	PUBLIC	GENERAL SUPPORT	1,000
WILLAMETTE RIVERKEEPER1515 SW WATER AVE 102 PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	3,000
WESTERN RIVERS CONSERVANCY 71 SW OAK STREET STE 100 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	1,500
WILLIAM TEMPLE HOUSE2023 NW HOYT STREET PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	2,000
WHEEL TO WALK FOUNDATIONPO BOX 20146 PORTLAND, OR 97294	NONE	PUBLIC	GENERAL SUPPORT	1,500
WILLAMETTE WEST HABITAT FOR HUMANITY2630 SE 39TH LOOP - SUITE A HILLSBORO, OR 97123	NONE	PUBLIC	GENERAL SUPPORT	1,000
YOUNG AUDIENCES OF OREGON INC1220 SW MORRISON STREET SUITE 900 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
YMCA OF COLUMBIA-WILLAMETTE 9500 SW BARBUR BLVD SUITE 200 PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	3,000
YMCA OF GREATER PORTLAND1111 SW 10TH AVENUE PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	2,500
Total  3a				423,752

TY 2009 Accounting Fees Schedule

Name: THE JACKSON FOUNDATION 97305070

EIN: 93-6020752

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP FEE	1,500			1,500

**TY 2009 Investments Corporate
Bonds Schedule**

Name: THE JACKSON FOUNDATION 97305070
EIN: 93-6020752

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIRST AMERICAN INTER TERM BOND	4,903,724	4,874,782

**TY 2009 Investments Corporate
Stock Schedule****Name:** THE JACKSON FOUNDATION 97305070**EIN:** 93-6020752

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EATON VANCE LARGE CAP VALUE	2,822,614	2,196,223
FIDELITY ADV DIVERSIFIED INTL		
FIRST AMERICAN M C GRWTH OPP	856,744	868,696
FIRST AMERICAN SMALL CAP SELEC	718,920	530,149
FRANK RUSSELL EMERGING MKT	300,000	214,120
LAUDUS ROSEN INTL S C FD		
T ROWE PRICE GROWTH STK	1,600,000	1,288,818
LAUDUS INTL MARKETMASTERS	680,000	641,252
AMERICAN EUROPACIFIC GRTH	620,000	588,325

TY 2009 Legal Fees Schedule

Name: THE JACKSON FOUNDATION 97305070

EIN: 93-6020752

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	100			100

TY 2009 Other Expenses Schedule

Name: THE JACKSON FOUNDATION 97305070

EIN: 93-6020752

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEE	1,100	0		1,100
GRANTMAKERS	1,900	0		1,900
WEB HOSTING	118	0		118
MICROEDGE, LLC	1,399	0		0

TY 2009 Taxes Schedule

Name: THE JACKSON FOUNDATION 97305070

EIN: 93-6020752

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FED EXCISE ESTIMATES	2,263	0		0