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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.

2012

For calendar year 2012 or tax year beginning MAR 22, 2012, and ending DEC 31, 2012

Name of foundation JOHN JORDAN FOUNDATION

A Employer identification number

45-4735384

Number and street (or P O box number if mail is not delivered to street address)  
P.O. BOX 1949

Room/suite

B Telephone number

707-484-7805

City or town, state, and ZIP code

HEALDSBURG, CA 95448

C If exemption application is pending, check here ► G Check all that apply:  
 Initial return  
 Final return  
 Address change Initial return of a former public charity  
 Amended return  
 Name changeD 1. Foreign organizations, check here ► 2. Foreign organizations meeting the 85% test, check here and attach computation ► H Check type of organization:  
 Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  
 Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ► I Fair market value of all assets at end of year (from Part II, col. (c), line 16)  
► \$ 40,643. (Part I, column (d) must be on cash basis)J Accounting method:  Cash  Accrual  
 Other (specify)F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► 

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

|                                       |   | (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  | 535,000.                           |                           | N/A                     |   |
|                                       | 2 Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B                      |                                    |                           |                         |   |
|                                       | 3 Interest on savings and temporary cash investments  | 5.                                 | 5.                        |                         | STATEMENT 1   |
|                                       | 4 Dividends and interest from securities  |                                    |                           |                         |   |
|                                       | 5a Gross rents  |                                    |                           |                         |   |
|                                       | b Net rental income or (loss)   |                                    |                           |                         |   |
|                                       | 6a Net gain or (loss) from sale of assets not on line 10<br>b Gross sales price for all assets on line 6a |                                    |                           |                         |   |
|                                       | 7 Capital gain net income (from Part IV, line 2)  |                                    | 0.                        |                         |   |
|                                       | 8 Net short-term capital gain   |                                    |                           |                         |   |
|                                       | 9 Income modifications<br>Gross sales less returns and allowances   |                                    |                           |                         |   |
|                                       | b Less Cost of goods sold   |                                    |                           |                         |   |
|                                       | c Gross profit or (loss)  |                                    |                           |                         |   |
| Operating and Administrative Expenses | 11 Other income   |                                    |                           |                         |   |
|                                       | 12 Total. Add lines 1 through 11  | 535,005.                           | 5.                        |                         |   |
|                                       | 13 Compensation of officers, directors, trustees, etc   | 118,638.                           | 0.                        |                         | 0.  |
|                                       | 14 Other employee salaries and wages  |                                    |                           |                         |   |
|                                       | 15 Pension plans, employee benefits   |                                    |                           |                         |   |
|                                       | 16a Legal fees  |                                    |                           |                         |   |
|                                       | b Accounting fees   |                                    |                           |                         |   |
|                                       | c Other professional fees   |                                    |                           |                         |   |
|                                       | 17 Interest   |                                    |                           |                         |   |
|                                       | 18 Taxes  | 9,132.                             | 0.                        |                         | 0.  |
|                                       | 19 Depreciation and depletion   | 1,096.                             | 0.                        |                         |   |
|                                       | 20 Occupancy  |                                    |                           |                         |   |
| STMT 2                                | 21 Travel, conferences, and meetings  | 8,106.                             | 0.                        |                         | 8,106.  |
|                                       | 22 Printing and publications  | 119.                               | 0.                        |                         | 119.  |
|                                       | 23 Other expenses   | 9,649.                             | 0.                        |                         | 8,647.  |
|                                       | 24 Total operating and administrative expenses. Add lines 13 through 23                                   | 146,740.                           | 0.                        |                         | 16,872.   |
|                                       | 25 Contributions, gifts, grants paid  | 348,624.                           |                           |                         | 348,624.  |
|                                       | 26 Total expenses and disbursements. Add lines 24 and 25  | 495,364.                           | 0.                        |                         | 365,496.  |
|                                       | 27 Subtract line 26 from line 12:   |                                    |                           |                         |   |
|                                       | a Excess of revenue over expenses and disbursements   | 39,641.                            |                           |                         |   |
|                                       | b Net investment income (if negative, enter -0-)  |                                    | 5.                        |                         |   |
|                                       | c Adjusted net income (if negative, enter -0-)  |                                    |                           | N/A                     |   |

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| <b>Part II</b> <b>Balance Sheets</b> <small>Attached schedules and amounts in the description column should be end-of-year amounts only</small> |   | Beginning of year | End of year    |                       |
|---|---|-------------------|----------------|-----------------------|
|   |   | (a) Book Value    | (b) Book Value | (c) Fair Market Value |
| Assets  | 1 Cash - non-interest-bearing   |                   | 16,531.        | 16,531.               |
|   | 2 Savings and temporary cash investments  |                   |                |                       |
|   | 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  |                   |                |                       |
|   | 7 Other notes and loans receivable ►  |                   |                |                       |
|   | Less: allowance for doubtful accounts ►   |                   |                |                       |
|   | 8 Inventories for sale or use   |                   |                |                       |
|   | 9 Prepaid expenses and deferred charges   |                   |                |                       |
|   | 10a Investments - U.S. and state government obligations   |                   |                |                       |
|   | b Investments - corporate stock   |                   |                |                       |
|   | c Investments - corporate bonds   |                   |                |                       |
|   | 11 Investments - land, buildings, and equipment basis ►   |                   |                |                       |
|   | Less accumulated depreciation ►   |                   |                |                       |
|   | 12 Investments - mortgage loans   |                   |                |                       |
|   | 13 Investments - other  |                   |                |                       |
|   | 14 Land, buildings, and equipment: basis ►  | 5,178.            |                |                       |
|   | Less accumulated depreciation <b>STMT 4</b> ►   | 1,096.            | 0.             | 4,082.                |
|   | 15 Other assets (describe ► <b>STATEMENT 5</b> )  |                   | 19,028.        | 20,030.               |
|   | 16 Total assets (to be completed by all filers)   | 0.                | 39,641.        | 40,643.               |
| 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  |                   |                |                       |
|   | 22 Other liabilities (describe ► )  |                   |                |                       |
|   | 23 Total liabilities (add lines 17 through 22)  | 0.                | 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   | 0.                | 0.             |                       |
|   | 28 Paid-in or capital surplus, or land, bldg., and equipment fund   | 0.                | 0.             |                       |
|   | 29 Retained earnings, accumulated income, endowment, or other funds   | 0.                | 39,641.        |                       |
|   | 30 Total net assets or fund balances  | 0.                | 39,641.        |                       |
|   | 31 Total liabilities and net assets/fund balances   | 0.                | 39,641.        |                       |

**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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 0.      |
| 2 Enter amount from Part I, line 27a  | 2 | 39,641. |
| 3 Other increases not included in line 2 (itemize) ►  | 3 | 0.      |
| 4 Add lines 1, 2, and 3   | 4 | 39,641. |
| 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 | 39,641. |

**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<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.)  | (d) Date sold<br>(mo., day, yr.) |
| 1a  |   |  |   |                                  |
| b   | NONE  |  |   |                                  |
| c   |   |  |   |                                  |
| d   |   |  |   |                                  |
| e   |   |  |   |                                  |
| (e) Gross sales price   | (f) Depreciation allowed<br>(or allowable)  | (g) Cost or other basis<br>plus expense of sale  | (h) Gain or (loss)<br>(e) plus (f) minus (g)  |                                  |
| a   |   |  |   |                                  |
| b   |   |  |   |                                  |
| c   |   |  |   |                                  |
| d   |   |  |   |                                  |
| e   |   |  |   |                                  |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69   |   |  | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |                                  |
| (i) F.M.V. as of 12/31/69   | (j) Adjusted basis<br>as of 12/31/69  | (k) Excess of col. (i)<br>over col. (j), if any  |   |                                  |
| a   |   |  |   |                                  |
| b   |   |  |   |                                  |
| c   |   |  |   |                                  |
| d   |   |  |   |                                  |
| e   |   |  |   |                                  |
| 2 Capital gain net income or (net capital loss)   | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 } |  | 2   |                                  |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c).<br>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.)

N/A

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 the instructions before making any entries.

| (a)<br>Base period years<br>Calendar year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|--|--|--|---|
| 2011   |  |  |   |
| 2010   |  |  |   |
| 2009   |  |  |   |
| 2008   |  |  |   |
| 2007   |  |  |   |

2 Total of line 1, column (d)

2

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

4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5

4

5 Multiply line 4 by line 3

5

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

7 Add lines 5 and 6

7

8 Enter qualifying distributions from Part XII, line 4

8

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.

**Part VI | Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see 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)<br>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<br>c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).<br>2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)<br>3 Add lines 1 and 2<br>4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)<br>5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-<br>6 Credits/Payments:<br>a 2012 estimated tax payments and 2011 overpayment credited to 2012<br>b Exempt foreign organizations - tax withheld at source<br>c Tax paid with application for extension of time to file (Form 8868)<br>d Backup withholding erroneously withheld<br>7 Total credits and payments. Add lines 6a through 6d<br>8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached<br>9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed<br>10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid<br>11 Enter the amount of line 10 to be: Credited to 2013 estimated tax ► <span style="float: right;">Refunded ►</span><br><span style="float: right;">11</span> | 1  | 0. |
|   |   | 2  | 0. |
|   |   | 3  | 0. |
|   |   | 4  | 0. |
|   |   | 5  | 0. |
|   |   | 6a |    |
|   |   | 6b |    |
|   |   | 6c |    |
|   |   | 6d |    |
|   |   | 7  | 0. |
|   | 8   |    |    |
|   | 9   | 0. |    |
|   | 10  |    |    |
|   | 11  |    |    |

**Part VII-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?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?<br><i>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.</i> | <input checked="" type="checkbox"/> 1a <input checked="" type="checkbox"/> 1b |
| c Did the foundation file Form 1120-POL for this year?   | <input checked="" type="checkbox"/> 1c  |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation. ► \$ <u>0.</u> (2) On foundation managers. ► \$ <u>0.</u>   | <span style="float: right;">0.</span>   |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ <u>0.</u>   | <span style="float: right;">0.</span>   |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br><i>If "Yes," attach a detailed description of the activities.</i>   | <input checked="" type="checkbox"/> 2   |
| 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? <i>If "Yes," attach a conformed copy of the changes</i>  | <input checked="" type="checkbox"/> 3   |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?   | <input checked="" type="checkbox"/> 4a  |
| b If "Yes," has it filed a tax return on Form 990-T for this year?   | <input checked="" type="checkbox"/> 4b  |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br><i>If "Yes," attach the statement required by General Instruction T.</i>   | <input checked="" type="checkbox"/> 5   |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• 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?             | <span style="float: right;">N/A</span>  |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year?<br><i>If "Yes," complete Part II, col. (c), and Part XV</i>  | <input checked="" type="checkbox"/> 7   |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► <u>CA</u>  | <span style="float: right;">8b</span>   |
| 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? <i>If "No," attach explanation</i>   | <input checked="" type="checkbox"/> 8b  |
| 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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>  | <input checked="" type="checkbox"/> 9   |
| 10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>   | <span style="float: right;">STMT 6</span>                                     |
|  | <input checked="" type="checkbox"/> 10  |

Form 990-PF (2012)

**Part VII-A Statements Regarding Activities (continued)**

|    |   |   |
|----|---|---|
| 11 |   | X   |
| 12 |   | X   |
| 13 | X   |   |
| 14 | LISA SCHAFFNER  | Telephone no. ► 707-484-7805  |
|    | Located at ► 1474 ALEXANDER VALLEY ROAD, HEALDSBURG, CA   | ZIP+4 ► 95448   |
| 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   | ► <input type="checkbox"/>  |
| 16 | At any time during calendar year 2012, 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?<br>See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ► | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |

**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?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?<br>Organizations relying on a current notice regarding disaster assistance check here ►  | N/A   |    |
| 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 2012?   | 1c  | X  |
| 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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| If "Yes," list the years ► _____, _____, _____, _____, _____  |   |    |
| 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.)   | N/A   |    |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.<br>► _____, _____, _____, _____  | 2b  |    |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |    |
| b If "Yes," did it have excess business holdings in 2012 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 2012.) | N/A   |    |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  | 3b  |    |
| 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 2012?   | 4a  | X  |
|   | 4b  | X  |

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No
- (3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?  Yes  No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

 Yes  No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

 Yes  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.

 Yes  No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

 Yes  No

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

N/A

7b

N/A

►

## 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.

| (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 |
|--|---|---|---|---------------------------------------|
| THOMAS JOHN JORDAN II<br>P.O. BOX 1949<br>HEALDSBURG, CA 95448 | DIRECTOR (CHAIR OF THE BOARD)                             | 3.00                                      | 0.  | 0.                                    |
| LISA WITTKE SCHAFFNER<br>P.O. BOX 1949<br>HEALDSBURG, CA 95448 | EXECUTIVE DIRECTOR, PRESIDENT                             | 40.00                                     | 118,638.  | 0.                                    |
| JOSH HERMSMEYER<br>P.O. BOX 1949<br>HEALDSBURG, CA 95448       | DIRECTOR, SECRETARY, TREASURER                            | 1.00                                      | 0.  | 0.                                    |
|  |   |   |   |                                       |
|  |   |   |   |                                       |

2 Compensation of five highest-paid employees (other than those included on line 1). 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

Form 990-PF (2012)

**Part VIII** **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**
**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
|---|---------------------|------------------|
| <b>NONE</b>   |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |
|   |                     |                  |

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 | <b>N/A</b> |  |
| 2 |            |  |
| 3 |            |  |
| 4 |            |  |
|   |            |  |

**Part IX-B Summary of Program-Related Investments**

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

Amount

|   |            |  |
|---|------------|--|
| 1 | <b>N/A</b> |  |
| 2 |            |  |
| 3 |            |  |
|   |            |  |
|   |            |  |

All other program-related investments. See instructions.

|   |  |  |
|---|--|--|
| 3 |  |  |
|   |  |  |
|   |  |  |

Total. Add lines 1 through 3



0.

Form 990-PF (2012)

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:

- a Average monthly fair market value of securities
- b Average of monthly cash balances
- c Fair market value of all other assets
- d Total (add lines 1a, b, and c)

e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)

2 Acquisition indebtedness applicable to line 1 assets

3 Subtract line 2 from line 1d

4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)

5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4

6 Minimum investment return. Enter 5% of line 5 **ADJUSTED FOR SHORT TAX PERIOD**

|    |         |
|----|---------|
| 1a | 0.      |
| 1b | 79,546. |
| 1c | 0.      |
| 1d | 79,546. |
| 1e | 0.      |
| 2  | 0.      |
| 3  | 79,546. |
| 4  | 1,193.  |
| 5  | 78,353. |
| 6  | 3,059.  |

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain

foreign organizations check here ►  and do not complete this part.)

1 Minimum investment return from Part X, line 6

2a Tax on investment income for 2012 from Part VI, line 5

b Income tax for 2012. (This does not include the tax from Part VI.)

c Add lines 2a and 2b

3 Distributable amount before adjustments. Subtract line 2c from line 1

4 Recoveries of amounts treated as qualifying distributions

5 Add lines 3 and 4

6 Deduction from distributable amount (see instructions)

7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1

|    |        |
|----|--------|
| 1  | 3,059. |
| 2a |        |
| 2b |        |
| 2c | 0.     |
| 3  | 3,059. |
| 4  | 0.     |
| 5  | 3,059. |
| 6  | 0.     |
| 7  | 3,059. |

**Part XII Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:

a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26

b Program-related investments - total from Part IX-B

2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes

3 Amounts set aside for specific charitable projects that satisfy the:

a Suitability test (prior IRS approval required)

b Cash distribution test (attach the required schedule)

4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

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

6 Adjusted qualifying distributions. Subtract line 5 from line 4

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.

|    |          |
|----|----------|
| 1a | 365,496. |
| 1b | 0.       |
| 2  |          |
| 3a |          |
| 3b |          |
| 4  | 365,496. |
| 5  | 0.       |
| 6  | 365,496. |

**Part XIII Undistributed Income (see instructions)**

|  | (a)<br>Corpus | (b)<br>Years prior to 2011 | (c)<br>2011 | (d)<br>2012 |
|--|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2012 from Part XI, line 7   |               |                            |             | 3,059.      |
| 2 Undistributed income, if any, as of the end of 2012  |               |                            | 0.          |             |
| a Enter amount for 2011 only   |               |                            |             |             |
| b Total for prior years:   |               | 0.                         |             |             |
| 3 Excess distributions carryover, if any, to 2012:   |               |                            |             |             |
| a From 2007  |               |                            |             |             |
| b From 2008  |               |                            |             |             |
| c From 2009  |               |                            |             |             |
| d From 2010  |               |                            |             |             |
| e From 2011  |               |                            |             |             |
| f Total of lines 3a through e  | 0.            |                            |             |             |
| 4 Qualifying distributions for 2012 from Part XII, line 4: ► \$ 365,496.   |               |                            | 0.          |             |
| a Applied to 2011, but not more than line 2a   |               |                            |             |             |
| 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 2012 distributable amount   |               |                            |             |             |
| e Remaining amount distributed out of corpus   |               |                            |             | 3,059.      |
| 5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))   | 362,437.      |                            | 0.          | 0.          |
| 6 Enter the net total of each column as indicated below:   | 362,437.      |                            | 0.          |             |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5  |               |                            |             |             |
| 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 2011. Subtract line 4a from line 2a. Taxable amount - see instr.  |               |                            | 0.          |             |
| f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013  |               |                            |             | 0.          |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)   | 0.            |                            |             |             |
| 8 Excess distributions carryover from 2007 not applied on line 5 or line 7   | 0.            |                            |             |             |
| 9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a  | 362,437.      |                            |             |             |
| 10 Analysis of line 9:   |               |                            |             |             |
| a Excess from 2008   |               |                            |             |             |
| b Excess from 2009   |               |                            |             |             |
| c Excess from 2010   |               |                            |             |             |
| d Excess from 2011   |               |                            |             |             |
| e Excess from 2012   | 362,437.      |                            |             |             |



**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient                            | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount   |
|--------------------------------------|--|--------------------------------------|-------------------------------------|----------|
| Name and address (home or business)  |  |                                      |                                     |          |
| <i>a Paid during the year</i>        |  |                                      |                                     |          |
| SEE DETAIL SCHEDULE ATTACHED.        |  |                                      |                                     | 348,624. |
|                                      |  |                                      |                                     |          |
|                                      |  |                                      |                                     |          |
|                                      |  |                                      |                                     |          |
|                                      |  |                                      |                                     |          |
| <b>Total</b>                         |  |                                      | ► 3a                                | 348,624. |
| <i>b Approved for future payment</i> |  |                                      |                                     |          |
| NONE                                 |  |                                      |                                     |          |
|                                      |  |                                      |                                     |          |
|                                      |  |                                      |                                     |          |
|                                      |  |                                      |                                     |          |
| <b>Total</b>                         |  |                                      | ► 3b                                | 0.       |

223611  
12-05-12**AS AMENDED**

Form 990-PF (2012)

15231028 753617 200450.0

2012.06010 JOHN JORDAN FOUNDATION

11

20045002

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

|   | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income |
|---|---------------------------|---------------|--------------------------------------|---------------|---|
|   | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>Amount |   |
| 1 Program service revenue:                                      |                           |               |                                      |               |   |
| a   |                           |               |                                      |               |   |
| b   |                           |               |                                      |               |   |
| c   |                           |               |                                      |               |   |
| d   |                           |               |                                      |               |   |
| e   |                           |               |                                      |               |   |
| f   |                           |               |                                      |               |   |
| g Fees and contracts from government agencies                   |                           |               |                                      |               |   |
| 2 Membership dues and assessments                               |                           |               |                                      |               |   |
| 3 Interest on savings and temporary cash investments            |                           |               |                                      |               | 5.  |
| 4 Dividends and interest from securities                        |                           |               |                                      |               |   |
| 5 Net rental income or (loss) from real estate:                 |                           |               |                                      |               |   |
| a Debt-financed property  |                           |               |                                      |               |   |
| b Not debt-financed property                                    |                           |               |                                      |               |   |
| 6 Net rental income or (loss) from personal property            |                           |               |                                      |               |   |
| 7 Other investment income                                       |                           |               |                                      |               |   |
| 8 Gain or (loss) from sales of assets other than inventory      |                           |               |                                      |               |   |
| 9 Net income or (loss) from special events                      |                           |               |                                      |               |   |
| 10 Gross profit or (loss) from sales of inventory               |                           |               |                                      |               |   |
| 11 Other revenue:   |                           |               |                                      |               |   |
| a   |                           |               |                                      |               |   |
| b   |                           |               |                                      |               |   |
| c   |                           |               |                                      |               |   |
| d   |                           |               |                                      |               |   |
| e   |                           |               |                                      |               |   |
| 12 Subtotal. Add columns (b), (d), and (e)                      | 0.                        | 0.            | 0.                                   | 0.            | 5.  |
| 13 Total. Add line 12, columns (b), (d), and (e)                | 13                        |               |                                      |               | 5.  |
| (See worksheet in line 13 instructions to verify calculations.) |                           |               |                                      |               |   |

## **Relationship of Activities to the Accomplishment of Exempt Purposes**

223621  
12-05-12

**AS AMENDED**



## Schedule B

**(Form 990, 990-EZ,  
or 990-PF)**

Department of the Treasury  
Internal Revenue Service

## Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No 1545-0047

2012

**Name of the organization**

**Employer identification number**

## JOHN JORDAN FOUNDATION

45-4735384

**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

5016 (V6)

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

**X** For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

## Special Rules

- For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution 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 a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to 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. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ► \$

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not 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 Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization

Employer identification number

JOHN JORDAN FOUNDATION

45-4735384

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

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|------------|---|----------------------------|--|
| 1          | THOMAS JOHN JORDAN II<br>1474 ALEXANDER VALLEY ROAD<br>HEALDSBURG, CA 95448 | \$ 535,000.                | <input checked="" type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash |
|            |   |                            | (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   |                            | <input type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash            |
|            |   |                            | (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   |                            | <input type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash            |
|            |   |                            | (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   |                            | <input type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash            |
|            |   |                            | (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   |                            | <input type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash            |
|            |   |                            | (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   |                            | <input type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash            |
|            |   |                            | (Complete Part II if there is a noncash contribution.)   |

Name of organization

Employer identification number

JOHN JORDAN FOUNDATION

45-4735384

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

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

223453 12-21-12

AS AMENDED

Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

15231028 753617 200450.0

2012.06010 JOHN JORDAN FOUNDATION

20045002

**Name of organization**

**Employer identification number**

## JOHN JORDAN FOUNDATION

45-4735384

**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. 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) ► \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

| See separate page for Part II 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 |   |
|  |                     |                 |                                     | <b>(e) Transfer of gift</b>             |
|  |                     |                 |                                     | Transferee's name, address, and ZIP + 4 |
|  |                     |                 |                                     | <b>(e) Transfer of gift</b>             |
|  |                     |                 |                                     | Transferee's name, address, and ZIP + 4 |
|  |                     |                 |                                     | <b>(e) Transfer of gift</b>             |
|  |                     |                 |                                     | Transferee's name, address, and ZIP + 4 |
|  |                     |                 |                                     | <b>(e) Transfer of gift</b>             |
|  |                     |                 |                                     | Transferee's name, address, and ZIP + 4 |
|  |                     |                 |                                     | <b>(e) Transfer of gift</b>             |
|  |                     |                 |                                     | Transferee's name, address, and ZIP + 4 |

## Depreciation and Amortization Detail FORM 990-PF PAGE 1

990-PF

| Asset<br>Number                                      | Description of property   |                     |                 |             |                        |                    |  |                           |
|--|---|---------------------|-----------------|-------------|------------------------|--------------------|--|---------------------------|
|  | Date<br>placed<br>in service  | Method/<br>IRC sec. | Life<br>or rate | Line<br>No. | Cost or<br>other basis | Basis<br>reduction | Accumulated<br>depreciation/amortization | Current year<br>deduction |
| <b>MACHINERY &amp; EQUIPMENT</b>                     |   |                     |                 |             |                        |                    |  |                           |
| 1APPLE COMPUTERS                                     | 032912200DB   | 5.00                | 19B             |             | 4,386.                 |                    |  | 877.                      |
| 2PRINTER   | 030512200DB   | 5.00                | 17              |             | 434.                   |                    |  | 139.                      |
| 3OUTLOOK AND QUICKBOOKS                              | 052812SL  | 3.00                | 16              |             | 358.                   |                    |  | 80.                       |
| <b>* 990-PF PG 1 TOTAL MACHINERY &amp; EQUIPMENT</b> |   |                     |                 |             | 5,178.                 | 0.                 | 0.                                       | 1,096.                    |
| <b>INTANGIBLES</b>                                   |   |                     |                 |             |                        |                    |  |                           |
| <b>OTHER</b>   |   |                     |                 |             |                        |                    |  |                           |
| 4ORGANIZATION COSTS                                  | 032212248   | 180M                | 42              |             | 20,030.                |                    |  | 1,002.                    |
| <b>* 990-PF PG 1 TOTAL OTHER</b>                     |   |                     |                 |             | 20,030.                | 0.                 | 0.                                       | 1,002.                    |
| <b>* 990-PF PG 1 TOTAL INTANGIBLES</b>               |   |                     |                 |             | 20,030.                | 0.                 | 0.                                       | 1,002.                    |
| <b>* GRAND TOTAL 990-PF PG 1 DEPR &amp; AMORT</b>    |   |                     |                 |             | 25,208.                | 0.                 | 0.                                       | 2,098.                    |
| 216261<br>05-01-12                                   | # - Current year section 179 (a) Assets disposed<br><b>AS AMENDED</b> |                     |                 |             |                        |                    |  |                           |

JOHN JORDAN FOUNDATION

45-4735384

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

| SOURCE   | AMOUNT |
|--|--------|
| BUSINESS CHECKING ACCOUNT                      | 5.     |
| TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A | 5.     |

## FORM 990-PF TAXES STATEMENT 2

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| PAYROLL TAXES               | 9,132.                       | 0.                                |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 18 | 9,132.                       | 0.                                |                               | 0.                            |

## FORM 990-PF OTHER EXPENSES STATEMENT 3

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| LOGO DESIGN                 | 6,000.                       | 0.                                |                               | 6,000.                        |
| OFFICE EXPENSES             | 415.                         | 0.                                |                               | 415.                          |
| FEES AND LICENSES           | 875.                         | 0.                                |                               | 875.                          |
| DUES AND SUBSCRIPTIONS      | 1,085.                       | 0.                                |                               | 1,085.                        |
| MEALS AND ENTERTAINMENT     | 272.                         | 0.                                |                               | 272.                          |
| AMORTIZATION                | 1,002.                       | 0.                                |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 23 | 9,649.                       | 0.                                |                               | 8,647.                        |

## FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 4

| DESCRIPTION                        | COST OR<br>OTHER BASIS | ACCUMULATED<br>DEPRECIATION | BOOK VALUE |
|------------------------------------|------------------------|-----------------------------|------------|
| APPLE COMPUTERS                    | 4,386.                 | 877.                        | 3,509.     |
| PRINTER                            | 434.                   | 139.                        | 295.       |
| OUTLOOK AND QUICKBOOKS             | 358.                   | 80.                         | 278.       |
| ORGANIZATION COSTS                 | 20,030.                | 1,002.                      | 19,028.    |
| TOTAL TO FM 990-PF, PART II, LN 14 | 25,208.                | 2,098.                      | 23,110.    |

AS AMENDED

15231028 753617 200450.0

14 STATEMENT(S) 1, 2, 3, 4  
2012.06010 JOHN JORDAN FOUNDATION 20045002

FORM 990-PF

OTHER ASSETS

STATEMENT 5

| DESCRIPTION                      | BEGINNING OF<br>YR BOOK VALUE | END OF YEAR<br>BOOK VALUE | FAIR MARKET<br>VALUE |
|----------------------------------|-------------------------------|---------------------------|----------------------|
| ORGANIZATION COSTS               | 0.                            | 20,030.                   | 20,030.              |
| LESS ACCUMULATED AMORTIZATION    | 0.                            | -1,002.                   | 0.                   |
| TO FORM 990-PF, PART II, LINE 15 | 0.                            | 19,028.                   | 20,030.              |

FORM 990-PF

LIST OF SUBSTANTIAL CONTRIBUTORS  
PART VII-A, LINE 10

STATEMENT 6

NAME OF CONTRIBUTOR

ADDRESS

THOMAS J. JORDAN II

1474 ALEXANDER VALLEY ROAD  
HEALDSBURG, CA 95448

AS AMENDED

15231028 753617 200450.0

2012.06010 JOHN JORDAN FOUNDATION

15

STATEMENT(S) 5, 6

20045002

## EXPLANATION OF CHANGES TO INCOME

THE FOUNDATION ACCIDENTALLY INCLUDED A CONTRIBUTION  
IN THE AMOUNT OF \$250,000 IN 2012 THAT WAS  
ACTUALLY RECEIVED IN 2013.

|  |                 |
|--|-----------------|
| TOTAL CONTRIBUTIONS AS ORIGINALLY REPORTED | 785,005.        |
| TOTAL CONTRIBUTIONS AS AMENDED             | <u>535,005.</u> |
| DIFFERENCE                                 | 250,000.        |

Detail Schedule of Grants and Contributions Paid During the Year

| Recipient Name and Address  | Relationship | Foundation Status | Purpose of Grant or Contribution                        | Amount      |
|---|--------------|-------------------|---|-------------|
| Sonoma County Farm Bureau Foundation<br>970 Piner Road, Santa Rosa, CA 95403                          | None         | 501(c)3           | Scholarship program                                     | \$ 3,450.00 |
| The Healdsburg Chorus<br>P.O. Box 1792, Healdsburg, CA 95448  | None         | 501(c)3           | Sponsor free concerts for senior center & schools       | 500.00      |
| Soroptimist International of Healdsburg<br>P.O. Box 124, Healdsburg, CA 95448                         | None         | 501(c)3           | Shannon Boaz Scholarship for Girls                      | 1,000.00    |
| Healdsburg Greyhound Booster Club<br>P.O. Box 401, Healdsburg, CA 95448                               | None         | 501(c)3           | Scoreboards for Healdsburg High School                  | 11,687.46   |
| Catholic Charities<br>987 Airway Ct., Santa Rosa, CA 95403  | None         | 501(c)3           | Accreditation assistance                                | 22,000.00   |
| New Vision Santa Rosa Foundation<br>1260 N. Dutton Ave. Ste 272, Santa Rosa, CA 95401                 | None         | 501(c)3           | Santa Rosa Chamber Algebra Academy                      | 2,500.00    |
| H-Town Youth Theatre<br>P.O. Box 1948, Healdsburg, CA 95448-1948                                      | None         | 501(c)3           | Donation to fee-free theatre opportunities for children | 10,000.00   |
| Council On Aging Services for Seniors<br>30 Kawana Springs Rd., Santa Rosa, CA 95404                  | None         | 501(c)3           | Meals on Wheels program                                 | 3,900.00    |
| Sonoma County Children's Charities<br>414 Aviation Blvd., Santa Rosa, CA 95403-1069                   | None         | 501(c)3           | Donation to general fund                                | 20,000.00   |
| Boys and Girls Clubs of Central Sonoma County<br>2255 Challenger Way, Suite 101, Santa Rosa, CA 95407 | None         | 501(c)3           | Summer camp program                                     | 5,000.00    |
| Healdsburg Education Foundation<br>P.O. Box 1668, Healdsburg, CA 95448                                | None         | 501(c)3           | iPad program  | 70,000.00   |
| Healdsburg Education Foundation<br>P.O. Box 1668, Healdsburg, CA 95448                                | None         | 501(c)3           | CASA (Construction and Sustainability Academy) program  | 10,000.00   |
| St. John the Baptist Catholic School<br>217 Fitch Street, Healdsburg, CA 95448                        | None         | 501(c)3           | Graduation sponsor                                      | 260.00      |
| The Children's Village of Sonoma County<br>1321 Lila Lane, Santa Rosa, CA 95404                       | None         | 501(c)3           | Donation for foster care program                        | 25,000.00   |
| Friends of Henry 1  | None         | 501(c)3           | Sheriff's helicopter - Education outreach program       | 12,500.00   |

| Recipient Name and Address   | Relationship | Foundation Status | Purpose of Grant or Contribution                             | Amount    |
|--|--------------|-------------------|--|-----------|
| P O Box 618, Windsor, CA 95492   |              |                   |  |           |
| Santa Rosa Police Department<br>965 Sonoma Avenue, Santa Rosa, CA                            | None         | 170(c)(1)         | Modified Tricycle (for a disabled child)                     | 450 00    |
| Petaluma National Little League<br>P O Box 672, Petaluma, CA 94953                           | None         | 501(c)3           | Family travel for Little League World Series                 | 1,000 00  |
| Best Buddies International<br>901 Mission Street, Suite 208, San Francisco, CA 94103         | None         | 501(c)3           | Sponsor for bicycle ride to fund special needs programs      | 500 00    |
| Always Brothers Inc<br>P O Box 320513, Fairfield, CT 06825                                   | None         | 501(c)3           | Manne Corp run for fallen servicemen                         | 2,000 00  |
| Elise Allen High School FFA Ag Boosters<br>539 Bellevue Ave , Santa Rosa, CA 95407           | None         | 501(c)3           | Support Future Farmers of America Program                    | 2,800 00  |
| Worth our Weight Culinary Apprentice Program<br>1021 Hahman Drive, Santa Rosa, CA 95405      | None         | 501(c)3           | Food sponsorship   | 1,703 28  |
| Northern California Center for Well Being<br>365 B Tescon Cir , Ste. B, Santa Rosa, CA 95401 | None         | 501(c)3           | Funding for Peer to Peer Alcohol & Drug Counseling           | 20,000 00 |
| Community Action Partnership of Sonoma County<br>1330 N Dutton Ave, Santa Rosa, CA 95401     | None         | 501(c)3           | Multi-year donation of micro-loans for low-income businesses | 60,000 00 |
| United Way of the Wine County<br>418 B Street, Suite 400, Santa Rosa, CA 95401               | None         | 501(c)3           | Schools of Hope  | 20,000 00 |
| Marine Toys for Tots Foundation<br>18251 Quantico Gateway Drive, Triangle, VA 22172          | None         | 501(c)3           | Christmas toy drive  | 3,039 57  |
| Sonoma County Office of Education<br>5340 Skyline Blvd , Santa Rosa, CA                      | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                              | 5,500 00  |
| Wilson Elementary School<br>3775 Bodega Avenue, Petaluma, CA 94952                           | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                              | 198 00    |
| Comstock Junior High School<br>2750 West Steele Lane, Santa Rosa, CA 95403                   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                              | 875 00    |
| Sonoma County Office of Education- Alt Ed  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                              | 300 00    |

| Recipient Name and Address   | Relationship | Foundation Status | Purpose of Grant or Contribution | Amount |
|--|--------------|-------------------|----------------------------------|--------|
| 5340 Skylane Boulevard, Santa Rosa, CA 95403<br>Flower Elementary School<br>17600 Sonoma Highway, Sonoma, CA 95476 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Technology High<br>1801 E Colati Avenue, Rohnert Park, CA 94926  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Sunridge School<br>7285 Hayden Avenue, Sebastopol, CA 95472  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Prestwood Elementary School<br>343 E MacArthur, Sonoma, CA 95476   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| McKinley Elementary School<br>110 Ellis Street, Petaluma, CA 94952   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Cinnabar Elementary School<br>296 Skillman Lane, Petaluma, CA 94952  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 850 00 |
| Willowside Middle School<br>5299 Hall Road, Santa Rosa, CA 95401   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Bellevue Elementary School<br>3223 Primrose Avenue, Santa Rosa, CA 95407   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| JX Wilson School<br>246 Brittain Lane, Santa Rosa, CA 95401  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 600 00 |
| Healdsburg Junior High School<br>315 Grant Street, Healdsburg, CA 95448  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Santa Rosa French-American Charter School<br>1275 Fourth Street, Santa Rosa, CA 95404                              | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Meadow View Elementary School<br>2665 Dutton Meadow Avenue, Santa Rosa, CA 95407                                   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Westside Elementary School<br>1201 Felta Road, Healdsburg, CA 95448  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Woodland Star Charter School   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 886 00 |

John Jordan Foundation  
 Form 990-PF, Part XV  
 Detail Schedule of Grants and Contributions Paid During the Year

EIN 45-4735384

| Recipient Name and Address   | Relationship | Foundation Status | Purpose of Grant or Contribution | Amount |
|--|--------------|-------------------|----------------------------------|--------|
| 17811 Arnold Drive, Sonoma, CA 95476<br>Santa Rosa Charter School<br>2770 West Steele Lane, Santa Rosa, CA 95403 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 256 00 |
| Guerneville School<br>14630 Armstrong Woods Road, Guerneville, CA 95446  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Piner High School<br>1700 Fulton Road, Santa Rosa, CA 95403  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 550 00 |
| Lincoln Elementary School<br>850 West Ninth Street, Santa Rosa, CA 95401   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 600 00 |
| Cali Caleme Language Academy<br>9491 Starr Road, Windsor, CA 95492   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Cotati Rohnert Park Unified School District<br>7165 Burton Avenue, Rohnert Park, CA 94928-3316                   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Penngrove Elementary School<br>365 Adobe Road, Penngrove, CA 94951   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 588 00 |
| El Molino High School<br>7050 Covey Road, Forestville, CA 95436  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Santa Rosa High School<br>1235 Mendocino Avenue, Santa Rosa, CA 95401  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 190 00 |
| Rancho Cotate High School - AVID program<br>5450 Snyder Lane, Rohnert Park, CA 94928                             | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Monte Vista Elementary School<br>1400 Magnolia Avenue, Rohnert Park, CA 94928                                    | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Waugh School District<br>1851 Hartman Lane, Petaluma, CA 94954   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 150 00 |
| Helen Lehman Elementary School<br>1700 Jennings Avenue, Santa Rosa, CA 95401                                     | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 275 00 |
| James Monroe Elementary School   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 600 00 |

| Recipient Name and Address  | Relationship | Foundation Status | Purpose of Grant or Contribution | Amount |
|---|--------------|-------------------|----------------------------------|--------|
| 2567 Marlow Road, Santa Rosa, CA 95403  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 690 00 |
| Albert F. Biella Elementary School<br>2140 Jennings Avenue, Santa Rosa, CA 95401              | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Nueva Vista High School<br>2232 Lomitas Avenue, Santa Rosa, CA 95404                          | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 135 00 |
| Olivet Charter School<br>1825 Willowside Road, Santa Rosa, CA 95401                           | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Roseland Preparatory School<br>1934 Biwana Drive, Santa Rosa, CA 95407                        | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 757 94 |
| Cloverdale High School<br>509 North Cloverdale Boulevard, Cloverdale, CA 95425                | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Laguna High School<br>445 Taft Street, Sebastopol, CA 95472                                   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Dunbar Elementary School<br>11700 Dunbar Rd , Glen Ellen, CA 95442                            | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 299 00 |
| Kenilworth Junior High School<br>800 Riesling Rd , Petaluma, CA 94954                         | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 600 00 |
| Sonoma Valley High School<br>20000 Broadway, Sonoma, CA 95476                                 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 255 00 |
| Sebastopol Independent Charter School<br>200 S Main Street, PO Box 1170, Sebastopol, CA 95473 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Windsor Oaks Academy<br>8681 Windsor Rd , Windsor, CA 95492                                   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 299 00 |
| Steele Lane Elementary School<br>301 Steele Lane, Santa Rosa, CA 95403                        | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Yulupa Elementary School<br>2250 Mesquite Dr , Santa Rosa, CA 95405                           | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Mark West Elementary School   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |

| Recipient Name and Address  | Relationship | Foundation Status | Purpose of Grant or Contribution | Amount |
|---|--------------|-------------------|----------------------------------|--------|
| 4600 Lavell Rd , Santa Rosa, CA 95403   | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Bennett Valley Union School District<br>2250 Mesquite Dr , Santa Rosa, CA 95405 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Horizon Elementary School<br>35555 Annapolis Rd , Annapolis, CA 95412           | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Cherry Valley Elementary School<br>1001 Cherry St , Petaluma, CA 94952          | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Twin Hills Charter Middle School<br>1685 Water Trough Rd , Sebastopol, CA 95472 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 213 00 |
| Two Rock Elementary School<br>5001 Spring Hill Rd , Petaluma, CA 94952          | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Windsor Middle School<br>9500 Brooks Rd South, Windsor, CA 95492                | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Matte Washburn Elementary School<br>75 Pleasant Ave , Santa Rosa, CA 95403      | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Summerfield Waldorf School<br>655 Willowside Rd , Santa Rosa, CA 95401          | None         | 501(c)3           | Teacher's Wishes Grant campaign  | 238 00 |
| Mano Carrillo High School<br>6975 Montecito Blvd , Santa Rosa, CA 95409         | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| San Miguel Elementary School<br>5550 Faught Rd , Santa Rosa, CA 95403           | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 250 00 |
| Windsor High School<br>8695 Windsor Rd , Windsor, CA 95492                      | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 600 00 |
| Ridgeway High School<br>325 Ridgeway Ave , Santa Rosa, CA 95401                 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| La Tercera Elementary School<br>1600 Albin Way , Petaluma, CA 94954             | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 235 00 |
| Alexander Valley Union Elementary School  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |

| Recipient Name and Address   | Relationship | Foundation Status | Purpose of Grant or Contribution | Amount |
|--|--------------|-------------------|----------------------------------|--------|
| 8511 California 128, Healdsburg, CA 95448  |              |                   |                                  |        |
| Matanzas Elementary School<br>1687 Yulupa Ave, Santa Rosa, CA 95405                | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 296 00 |
| Guerneville Elementary School<br>14630 Armstrong Woods Rd , Guerneville, CA 95446  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Liberty Elementary School<br>170 Liberty School Rd , Petaluma, CA 94952            | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Harmony Elementary School<br>1935 Bohemian Highway, Occidental, CA 95465           | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Hidden Valley Elementary School<br>3435 Bonita Vista Ln , Santa Rosa, CA 95404     | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| McDowell Elementary School<br>421 S McDowell Blvd, Petaluma, CA 94954              | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 250 00 |
| Rancho Cotate High School<br>5450 Snyder Ln , Rohnert Park, CA 94928               | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| North County Consortium- WUSD<br>9291 Old Redwood Hwy, Bldg 500, Windsor, CA 95492 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 260 00 |
| Santa Rosa Middle School<br>500 E St , Santa Rosa, CA 95404                        | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Taylor Mountain Elementary School<br>1210 Bellvue Ave, Santa Rosa, CA 95407        | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Herbert Slater Middle School<br>3500 Sonoma Ave , Santa Rosa, CA 95405             | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Petaluma Junior High School<br>700 Bantam Way, Petaluma                            | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Adèle Harrison Middle School<br>1150 Broadway, Sonoma, CA 95476                    | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |
| Proctor Terrace Elementary School  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign  | 300 00 |

| Recipient Name and Address  | Relationship | Foundation Status | Purpose of Grant or Contribution                                  | Amount        |
|---|--------------|-------------------|---|---------------|
| 1711 Bryden Lane, Santa Rosa, CA 95404  | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                                   | 300 00        |
| Monte Rio Elementary School<br>20700 Foothill Dr , Monte Rio, CA 95462          | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                                   | 300 00        |
| Binkley Elementary School<br>4965 Canyon Dr , Santa Rosa, CA 95409              | None         | 501(c)3           | Teacher's Wishes Grant campaign                                   | 300 00        |
| Analy High School Education Foundation<br>6950 Analy Ave , Sebastopol, CA 95472 | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                                   | 300 00        |
| Schaefer Elementary School<br>1370 San Miguel Rd , Santa Rosa, CA 95403         | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                                   | 538 00        |
| Jack London Elementary School<br>2707 Francisco Ave , Santa Rosa, CA 95403      | None         | 170(c)(1)         | Teacher's Wishes Grant campaign                                   | 300 00        |
| Evergreen Elementary School<br>1125 Emily Ave , Rohnert Park, CA 94928          | None         | 501(c)3           | Donation to food program  | 5,000 00      |
| Healdsburg Food Pantry<br>1505 Healdsburg Ave, Healdsburg, CA 95448             | None         | 170(c)(1)         | Internet Fair (Digital Divide) plus Teacher Wishes Grant campaign | 1,300 00      |
| Lawrence Cook Middle School<br>2480 Sebastopol Rd , Santa Rosa, CA 95407        |              |                   |   | \$ 348,624.25 |
| Total Grants and Contributions  |              |                   |   |               |

Depreciation and Amortization 990-PF  
(Including Information on Listed Property)

► See separate instructions. ► Attach to your tax return.

Name(s) shown on return

Business or activity to which this form relates

Identifying number

JOHN JORDAN FOUNDATION

FORM 990-PF PAGE 1

45-4735384

## Part I Election To Expense Certain Property Under Section 179 Note: If you have any listed property, complete Part V before you complete Part I.

|  |   |            |
|--|---|------------|
| 1 Maximum amount (see instructions)  | 1 | 500,000.   |
| 2 Total cost of section 179 property placed in service (see instructions)  | 2 |            |
| 3 Threshold cost of section 179 property before reduction in limitation  | 3 | 2,000,000. |
| 4 Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-   | 4 |            |
| 5 Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions | 5 |            |

| 6 | (a) Description of property | (b) Cost (business use only) | (c) Elected cost |  |
|---|-----------------------------|------------------------------|------------------|--|
|   |                             |                              |                  |  |
|   |                             |                              |                  |  |
|   |                             |                              |                  |  |
|   |                             |                              |                  |  |

|   |    |  |
|---|----|--|
| 7 Listed property. Enter the amount from line 29  | 7  |  |
| 8 Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7            | 8  |  |
| 9 Tentative deduction. Enter the smaller of line 5 or line 8                                      | 9  |  |
| 10 Carryover of disallowed deduction from line 13 of your 2011 Form 4562                          | 10 |  |
| 11 Business income limitation Enter the smaller of business income (not less than zero) or line 5 | 11 |  |
| 12 Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11          | 12 |  |
| 13 Carryover of disallowed deduction to 2013. Add lines 9 and 10, less line 12 ► 13               |    |  |

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

## Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property)

|   |    |     |
|---|----|-----|
| 14 Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year | 14 |     |
| 15 Property subject to section 168(f)(1) election   | 15 |     |
| 16 Other depreciation (including ACRS)  | 16 | 80. |

## Part III MACRS Depreciation (Do not include listed property.) (See instructions.)

## Section A

|   |    |      |
|---|----|------|
| 17 MACRS deductions for assets placed in service in tax years beginning before 2012   | 17 | 139. |
| 18 If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ► <input type="checkbox"/> |    |      |

## Section B - Assets Placed in Service During 2012 Tax Year Using the General Depreciation System

| (a) Classification of property | (b) Month and year placed in service | (c) Basis for depreciation (business/investment use only - see instructions) | (d) Recovery period | (e) Convention | (f) Method | (g) Depreciation deduction |
|--------------------------------|--------------------------------------|--|---------------------|----------------|------------|----------------------------|
| 19a 3-year property            |                                      |  |                     |                |            |                            |
| b 5-year property              |                                      | 4,386.   | 5 YRS.              | HY             | 200DB      | 877.                       |
| c 7-year property              |                                      |  |                     |                |            |                            |
| d 10-year property             |                                      |  |                     |                |            |                            |
| e 15-year property             |                                      |  |                     |                |            |                            |
| f 20-year property             |                                      |  |                     |                |            |                            |
| g 25-year property             |                                      |  | 25 yrs.             |                | S/L        |                            |
| h Residential rental property  | /                                    |  | 27.5 yrs.           | MM             | S/L        |                            |
|                                | /                                    |  | 27.5 yrs.           | MM             | S/L        |                            |
| i Nonresidential real property | /                                    |  | 39 yrs.             | MM             | S/L        |                            |
|                                | /                                    |  |                     | MM             | S/L        |                            |

## Section C - Assets Placed in Service During 2012 Tax Year Using the Alternative Depreciation System

|                |   |  |        |     |     |
|----------------|---|--|--------|-----|-----|
| 20a Class life |   |  |        | S/L |     |
| b 12-year      |   |  | 12 yrs |     | S/L |
| c 40-year      | / |  | 40 yrs | MM  | S/L |

## Part IV Summary (See instructions)

|   |    |        |
|---|----|--------|
| 21 Listed property Enter amount from line 28  | 21 |        |
| 22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr. | 22 | 1,096. |
| 23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs  | 23 |        |

|   |  |  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|--|
| <b>Part V</b>   | Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.) |  |  |  |  |  |  |  |  |
| Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable |  |  |  |  |  |  |  |  |  |

**Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)**

|  |                               |   |                            |  |                              |                             |  |                                 |  |                              |                             |
|--|-------------------------------|---|----------------------------|--|------------------------------|-----------------------------|--|---------------------------------|--|------------------------------|-----------------------------|
| 24a Do you have evidence to support the business/investment use claimed?   |                               |   |                            |  | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 24b If "Yes," is the evidence written? |                                 |  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| (a)<br>Type of property<br>(list vehicles first)   | (b)<br>Date placed in service | (c)<br>Business/investment use percentage | (d)<br>Cost or other basis | (e)<br>Basis for depreciation (business/investment use only) | (f)<br>Recovery period       | (g)<br>Method/Convention    | (h)<br>Depreciation deduction          | (i)<br>Elected section 179 cost |  |                              |                             |
| 25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use |                               |   |                            |  | 25                           |                             |  |                                 |  |                              |                             |
| 26 Property used more than 50% in a qualified business use:  |                               |   |                            |  |                              |                             |  |                                 |  |                              |                             |
|  |                               | %   |                            |  |                              |                             |  |                                 |  |                              |                             |
|  |                               | %   |                            |  |                              |                             |  |                                 |  |                              |                             |
|  |                               | %   |                            |  |                              |                             |  |                                 |  |                              |                             |
| 27 Property used 50% or less in a qualified business use:  |                               |   |                            |  |                              |                             |  |                                 |  |                              |                             |
|  |                               | %   |                            |  |                              | S/L -                       |  |                                 |  |                              |                             |
|  |                               | %   |                            |  |                              | S/L -                       |  |                                 |  |                              |                             |
|  |                               | %   |                            |  |                              | S/L -                       |  |                                 |  |                              |                             |
| 28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1   |                               |   |                            |  | 28                           |                             |  |                                 |  |                              |                             |
| 29 Add amounts in column (i), line 26. Enter here and on line 7, page 1  |                               |   |                            |  | 29                           |                             |  |                                 |  |                              |                             |

**Section B - Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

|  |                |                |                |                |                |                |     |    |     |    |
|--|----------------|----------------|----------------|----------------|----------------|----------------|-----|----|-----|----|
| 30 Total business/investment miles driven during the year (do not include commuting miles)<br>31 Total commuting miles driven during the year<br>32 Total other personal (noncommuting) miles driven<br>33 Total miles driven during the year.<br>Add lines 30 through 32<br>34 Was the vehicle available for personal use during off-duty hours?<br>35 Was the vehicle used primarily by a more than 5% owner or related person?<br>36 Is another vehicle available for personal use? | (a)<br>Vehicle | (b)<br>Vehicle | (c)<br>Vehicle | (d)<br>Vehicle | (e)<br>Vehicle | (f)<br>Vehicle |     |    |     |    |
|  |                |                |                |                |                |                |     |    |     |    |
|  |                |                |                |                |                |                |     |    |     |    |
|  |                |                |                |                |                |                |     |    |     |    |
|  |                |                |                |                |                |                |     |    |     |    |
|  |                |                |                |                |                |                |     |    |     |    |
|  | Yes            | No             | Yes            | No             | Yes            | No             | Yes | No | Yes | No |
|  |                |                |                |                |                |                |     |    |     |    |
|  |                |                |                |                |                |                |     |    |     |    |
|  |                |                |                |                |                |                |     |    |     |    |

**Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees**

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

|  |     |    |
|--|-----|----|
| 37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?<br>38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners<br>39 Do you treat all use of vehicles by employees as personal use?<br>40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?<br>41 Do you meet the requirements concerning qualified automobile demonstration use?<br>Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles. | Yes | No |
|  |     |    |
|  |     |    |
|  |     |    |
|  |     |    |

**Part VI Amortization**

|   |                                 |                           |                     |  |                                   |
|---|---------------------------------|---------------------------|---------------------|--|-----------------------------------|
| (a)<br>Description of costs   | (b)<br>Date amortization begins | (c)<br>Amortizable amount | (d)<br>Code section | (e)<br>Amortization period or percentage | (f)<br>Amortization for this year |
| 42 Amortization of costs that begins during your 2012 tax year                |                                 |                           |                     |  |                                   |
| ORGANIZATION COSTS  | 032212                          | 20,030.                   | 248                 | 180M                                     | 1,002.                            |
| 43 Amortization of costs that began before your 2012 tax year                 |                                 |                           |                     |  |                                   |
|   |                                 |                           |                     |  | 43                                |
|   |                                 |                           |                     |  | 44                                |
| 44 Total. Add amounts in column (f). See the instructions for where to report |                                 |                           |                     |  | 1,002.                            |

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

|   |   |  |
|---|---|--|
| Type or print   | Name of exempt organization or other filer, see instructions<br><b>JOHN JORDAN FOUNDATION</b>                           | Employer identification number (EIN) or<br><b>45-4735384</b> |
| File by the due date for filing your return. See instructions | Number, street, and room or suite no. If a P.O. box, see instructions.<br><b>P. O. BOX 1949</b>                         | Social security number (SSN)                                 |
|   | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>HEALDSBURG, CA 95448</b> |  |

Enter the Return code for the return that this application is for (file a separate application for each return)

**0 4**

| Application Is For                       | Return Code | Application Is For | Return Code |
|--|-------------|--------------------|-------------|
| Form 990 or Form 990-EZ                  | 01          | Form 990-BL        | 02          |
| Form 990-BL                              | 02          | Form 1041-A        | 08          |
| Form 4720 (individual)                   | 03          | Form 4720          | 09          |
| Form 990-PF                              | 04          | Form 5227          | 10          |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05          | Form 6069          | 11          |
| Form 990-T (trust other than above)      | 06          | Form 8870          | 12          |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**LISA SCHAFFNER**

- The books are in the care of ► **1474 ALEXANDER VALLEY ROAD - HEALDSBURG, CA 95448**
- Telephone No. ► **707-484-7805** FAX No. ►
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ► . If it is for part of the group, check this box ►  and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2013**

5 For calendar year , or other tax year beginning **MAR 22, 2012**, and ending **DEC 31, 2012**.

6 If the tax year entered in line 5 is for less than 12 months, check reason:  Initial return  Final return

Change in accounting period

7 State in detail why you need the extension

**THE FOUNDATION REQUIRES ADDITIONAL TIME TO GATHER THE INFORMATION  
NECESSARY TO FILE A COMPLETE AND ACCURATE TAX RETURN.**

|   |    |    |    |
|---|----|----|----|
| 8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.   | 8a | \$ | 0. |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868. | 8b | \$ | 0. |
| c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.   | 8c | \$ | 0. |

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ►

Title ►

Date ►

Form 8868 (Rev. 1-2013)

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01-21-13

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2012.06010 JOHN JORDAN FOUNDATION

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