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Form

990-PF

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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OMB No 1545-0052



2013


Open to Public Inspection

For calendar year 2013, or tax year beginning 07-01-2013 , and ending 06-30-2014

Name of foundation THE JACKSON FOUNDATION 97305070		<b>A Employer identification number</b>  93-6020752	
Number and street (or P O box number if mail is not delivered to street address) P O BOX 3168		<b>B Telephone number</b> (see instructions)  (503) 464-3580	
City or town, state or province, country, and ZIP or foreign postal code PORTLAND, OR 97208		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input type="checkbox"/> \$ 14,194,358		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities. . . . .	216,227	216,227		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	347,763			
	b Gross sales price for all assets on line 6a 1,347,317				
	7 Capital gain net income (from Part IV, line 2) . . .		347,763		
	8 Net short-term capital gain . . . . .			0	
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold . . . . .				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	563,990	563,990		
	13 Compensation of officers, directors, trustees, etc	155,318	77,659		77,659
	14 Other employee salaries and wages . . . . .		0	0	0
	15 Pension plans, employee benefits . . . . .		0	0	
	16a Legal fees (attach schedule) . . . . .				0
	b Accounting fees (attach schedule) . . . . .	1,500	0	0	1,500
	c Other professional fees (attach schedule) . . . . .				0
	17 Interest . . . . .				0
	18 Taxes (attach schedule) (see instructions)	20,563	4,006		0
	19 Depreciation (attach schedule) and depletion . . .	0	0		
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .		0	0	
	22 Printing and publications . . . . .		0	0	
	23 Other expenses (attach schedule) . . . . .	5,038			5,038
	24 <b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	182,419	81,665	0	84,197
	25 Contributions, gifts, grants paid . . . . .	587,350			587,350
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	769,769	81,665	0	671,547
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-205,779			
	b <b>Net investment income</b> (if negative, enter -0-)		482,325		
	c <b>Adjusted net income</b> (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .	11,451		
	2	Savings and temporary cash investments . . . . .	195,284	198,901	198,901
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____ 0			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .	9,108,033 	8,991,815	11,890,350
	c	Investments—corporate bonds (attach schedule). . . . .	2,150,312 	2,068,584	2,105,107
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			0
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	11,465,080	11,259,300	14,194,358	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22) . . . . .		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds . . . . .	11,465,080	11,259,300	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	11,465,080	11,259,300	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	11,465,080	11,259,300	

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return) . . . . .	1	11,465,080
2	Enter amount from Part I, line 27a . . . . .	2	-205,779
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	11,259,301
5	Decreases not included in line 2 (itemize) ▶ _____ 	5	1
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	11,259,300

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	347,763
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)  If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 . . . . .		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	629,147	12,674,983	0 049637
2011	635,393	12,114,414	0 052449
2010	600,953	12,411,625	0 048419
2009	498,991	11,505,316	0 04337
2008	472,541	10,438,086	0 045271

2	Total of line 1, column (d). . . . .	2	0 239146
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . .	3	0 047829
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	13,552,976
5	Multiply line 4 by line 3. . . . .	5	648,225
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	4,823
7	Add lines 5 and 6. . . . .	7	653,048
8	Enter qualifying distributions from Part XII, line 4. . . . .	8	671,547

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

<b>Part VI    Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)</b>		
<b>1a</b> Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
<b>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .	<b>1</b>	4,823
<b>c</b> All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0
<b>3</b> Add lines 1 and 2. . . . .	<b>3</b>	4,823
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	0
<b>5</b> <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	4,823
<b>6</b> Credits/Payments		
<b>a</b> 2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	14,772
<b>b</b> Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b> Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	0
<b>d</b> Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b> Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	14,772
<b>8</b> Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	<b>8</b>	0
<b>9</b> <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	<b>9</b>	
<b>10</b> <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	<b>10</b>	9,949
<b>11</b> Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> 4,824 <b>Refunded</b>	<b>11</b>	5,125

<b>Part VII-A    Statements Regarding Activities</b>			
<b>1a</b> 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? . . . . .	<b>1a</b>	<b>Yes</b>	<b>No</b>
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . . <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>	<b>1b</b>		<b>No</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?. . . . .	<b>1c</b>		<b>No</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation <input type="checkbox"/> \$ _____ <b>(2)</b> On foundation managers <input type="checkbox"/> \$ _____			
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____			
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>	<b>2</b>		<b>No</b>
<b>3</b> 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> . . . . .	<b>3</b>		<b>No</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .	<b>4a</b>		<b>No</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?. . . . .	<b>4b</b>		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>	<b>5</b>		<b>No</b>
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	<b>6</b>	<b>Yes</b>	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	<b>7</b>	<b>Yes</b>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> OR _____			
<b>b</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>	<b>8b</b>	<b>Yes</b>	
<b>9</b> 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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> . . . . .	<b>9</b>		<b>No</b>
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	<b>10</b>		<b>No</b>

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of US BANK Telephone no (503) 464-3580 Located at 555 SW OAK PORTLAND OR ZIP +4 97204			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions ).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2013 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 2013.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 5a(1)–(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?		5b		
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?		<input type="checkbox"/> Yes	<input type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		No
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
US BANK	CO-TRUSTEE	156,818		
PO BOX 3168 PORTLAND, OR 97208	1			
JULIE VIGELAND	CO-TRUSTEE	0		
900 SW 5TH AVE STE 2300 PORTLAND, OR 97204	1			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. . . . .		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

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



Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	13,303,413
b	Average of monthly cash balances. . . . .	1b	455,953
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	13,759,366
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	0
3	Subtract line 2 from line 1d. . . . .	3	13,759,366
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	206,390
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	13,552,976
6	Minimum investment return. Enter 5% of line 5. . . . .	6	677,649

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. . . . .	1	677,649
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	4,823
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	4,823
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	672,826
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	672,826
6	Deduction from distributable amount (see instructions). . . . .	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	672,826

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. . . . .	1a	671,547
b	Program-related investments—total from Part IX-B. . . . .	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	0
b	Cash distribution test (attach the required schedule). . . . .	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	671,547
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	5	4,823
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	666,724
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				672,826
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only. . . . .			0	
b Total for prior years 2011 , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008. . . . .				0
b From 2009. . . . .				0
c From 2010. . . . .				0
d From 2011. . . . .				20,162
e From 2012. . . . .				10,170
f Total of lines 3a through e. . . . .	30,332			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 671,547				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
c Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
d Applied to 2013 distributable amount. . . . .				671,547
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	1,279			1,279
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	29,053			
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 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	29,053			
10 Analysis of line 9				
a Excess from 2009. . . .				0
b Excess from 2010. . . .				0
c Excess from 2011. . . .				18,883
d Excess from 2012. . . .				10,170
e Excess from 2013. . . .				

Part XIV

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

b

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

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a

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

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

b

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

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

c

Any submission deadlines

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

d

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

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	587,350
b Approved for future payment				
Total . . . . .			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)



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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
7896 988 NUVEEN SANTA BARBARA DIV GROWTH FD I		2011-09-02	2013-08-07
7903 392 NUVEEN REAL ESTATE SECS I		2011-09-02	2013-08-23
4775 892 NUVEEN FUNDS CORE BD FD I		2003-05-12	2013-08-23
3067 449 NUVEEN FUNDS CORE BD FD I		2013-06-10	2013-08-23
2288 318 NUVEEN SANTA BARBARA DIV GROWTH FD I		2011-09-02	2013-08-26
7329 049 NUVEEN SANTA BARBARA DIV GROWTH FD I		2011-09-02	2013-12-23
32268 472 NUVEEN INFLATION PRO SEC CL I		2011-09-02	2013-12-23
CAPITAL GAIN DIVIDENDS	P		

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


(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
241,253		179,893	61,360
167,473		143,889	23,584
47,807		50,195	-2,388
30,705		31,533	-828
69,153		52,128	17,025
240,173		166,956	73,217
348,822		374,960	-26,138
			201,931



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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			61,360
			23,584
			-2,388
			-828
			17,025
			73,217
			-26,138


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
ADELANTE MUJERES 2036 MAIN ST SUITE A FOREST GROVE,OR 97116	NONE	PUBLIC	GENERAL SUPPORT	1,500
ALBERTINA KERR CENTER 424 NE 22ND AVE PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	10,000
ARTISTS REPERTORY THEATRE 1515 SW MORRISON PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	4,000
BETTER PEOPLE 4310 NE MLK JR BLVD PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,500
BIENESTAR 220 SE 12TH AVE STE A-100 HILLSBORO,OR 97123	NONE	PUBLIC	GENERAL SUPPORT	2,000
BIG BROTHERS BIG SISTERS NORTHWEST 1827 NE 44TH AVE PORTLAND,OR 97213	NONE	PUBLIC	GENERAL SUPPORT	7,500
BIRCH COMMUNITY SERVICES 17780 NE SAN RAFAEL PORTLAND,OR 97230	NONE	PUBLIC	GENERAL SUPPORT	5,000
BRADLEY ANGLE HOUSE 5432 N ALBINA ST PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	5,000
BROADWAY ROSE THEATRE CO PO BOX 231004 TIGARD,OR 97281	NONE	PUBLIC	GENERAL SUPPORT	3,000
CALDERA 224 NW 13TH AVENUE STE 304 PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	2,500
CAMPFIRE USA PORTLAND COLUMBIA 619 SW 11TH AVE STE 234 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,000
CASA FOR CHILDREN 1401 NE 68TH AVE PORTLAND,OR 97213	NONE	PUBLIC	GENERAL SUPPORT	5,000
CASCADE AIDS PROJECT 208 SW 5TH AVE STE 800 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	1,500
THE CHILDRENS BOOK BANK 2680 SW RAVENSVIEW DRIVE PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	2,500
CENTER FOR EARTH LEADERSHIP 319 SW WASHINGTON ST 400 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	3,500
<b>Total . . . . .</b>  <b>3a</b>				587,350

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
CHAMBER MUSIC NORTHWEST 522 SW 5TH AVE STE 920 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	3,000
CHESS FOR SUCCESS 2701 NW VAUGHN ST SUITE 101 PORTLAND,OR 97210	NONE	PUBLIC	GENERAL SUPPORT	4,000
CHILDREN'S CENTER 1713 PENN LANE OREGON CITY,OR 97045	NONE	PUBLIC	GENERAL SUPPORT	1,500
CLASSIC GREEK THEATRE OF OREGON PO BOX 23908 PORTLAND,OR 97281	NONE	PUBLIC	GENERAL SUPPORT	750
CLASSROOM LAW PROJECT 620 SW MAIN ST SUITE 102 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,000
COMMUNITY TRANSITIONAL SCHOOL 6601 NE KILLINGSWORTH ST PORTLAND,OR 97218	NONE	PUBLIC	GENERAL SUPPORT	5,000
CONDUIT DANCE INC 918 SW YAMHILL ST STE 401 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,000
CONSTRUCTING HOPE 405 NE CHURCH ST PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,000
THE DOUGY CENTER INC 3903 SE 52ND AVE PORTLAND,OR 97206	NONE	PUBLIC	GENERAL SUPPORT	3,500
DRESS FOR SUCCESS OF OREGON INC 1532 B NE 37TH AVE PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
ELEVATE OREGON 12730 NE MARX ST PORTLAND,OR 97230	NONE	PUBLIC	GENERAL SUPPORT	4,000
EARTHSHARE OREGON PO BOX 40333 PORTLAND,OR 97240	NONE	PUBLIC	GENERAL SUPPORT	2,500
FAMILY STEPPING STONES 18907 PORTLAND AVENUE GLADSTONE,OR 97207	NONE	PUBLIC	GENERAL SUPPORT	1,000
THE FRESHWATER TRUST 65 SW YAMHILL ST STE 200 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	2,500
FRIENDS OF THE CHILDREN- PORTLAND 44 NE MORRIS ST PORTLAND,OR 97212	NONE	PUBLIC	GENERAL SUPPORT	3,500
<b>Total . . . . .</b>  <b>3a</b>				587,350

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
FRIENDS OF TRYON CREEK 11321 SW TERWILLIGER BLVD PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	1,000
FRIENDS OF ZENGER FARM 11741 SE FOSTER RD PORTLAND, OR 97266	NONE	PUBLIC	GENERAL SUPPORT	5,000
GROWING GARDENS 2203 NE OREGON ST PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
HUMAN SOLUTIONS INC 12350 SE POWELL BLVD PORTLAND, OR 97236	NONE	PUBLIC	GENERAL SUPPORT	5,000
I HAVE A DREAM FOUNDATION OREGON 2916 NE ALBERTA STREET SUITE D PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	12,000
IMAGO THEATRE PO BOX 15182 PORTLAND, OR 97293	NONE	PUBLIC	GENERAL SUPPORT	3,000
IMPACT NW 10055 E BURNSIDE ST PORTLAND, OR 97216	NONE	PUBLIC	GENERAL SUPPORT	2,500
INTERFAITH FOOD & FARMS PARTNERSHIP 0245 SW BANCROFT ST STE B PORTLAND, OR 97239	NONE	PUBLIC	GENERAL SUPPORT	2,000
KINSHIP HOUSE 1823 NE 8TH AVE PORTLAND, OR 97212	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE LIBRARY FOUNDATION 620 SW 5TH AVE STE 102 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	7,000
LITERARY ARTS INC 925 SW WASHINGTON ST PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,500
MEDICAL TEAMS INTERNATIONAL 14150 SW MILTON CT TIGARD, OR 97224	NONE	PUBLIC	GENERAL SUPPORT	10,000
METROPOLITAN FAMILY SERVICE 1808 SE BELMONT ST PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,500
METROPOLITAN YOUTH SYMPHONY 4800 SW MACADAM SUITE 105 PORTLAND, OR 97239	NONE	PUBLIC	GENERAL SUPPORT	2,500
MIRACLE THEATRE GROUP 425 SE SIXTH AVENUE PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	2,500
<b>Total</b> . . . . .  <b>3a</b>				587,350


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MORRISON CHILD & FAMILY SERVICES 1035 NE SANDY BLVD PORTLAND,OR 97220	NONE	PUBLIC	GENERAL SUPPORT	3,000
MY VOICE MUSIC PO BOX 28043 PORTLAND,OR 97228	NONE	PUBLIC	GENERAL SUPPORT	1,000
NATIONAL FOREST FOUNDATION 805 SW BROADWAY SUITE 2100 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
NEIGHBORHOOD HOUSE INC 7780 SW CAPITOL HWY PORTLAND,OR 97219	NONE	PUBLIC	GENERAL SUPPORT	2,500
NORTH BY NE COMMUNITY HEALTHY CENTE 3030 NE MARTIN LUTHER KING JR BLVD PORTLAND,OR 97212	NONE	PUBLIC	GENERAL SUPPORT	2,000
NONPROFIT ASSN OF OR 5100 SW MACADAM AVE STE 360 PORTLAND,OR 97239	NONE	PUBLIC	GENERAL SUPPORT	7,500
NW CHILDREN'S THEATER & SCHOOL 1819 NW EVERETT ST PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	1,500
NW FILM CENTERPORTLAND ART MUSEUM 1219 SW PARK AVENUE PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,000
NW EARTH INSTITUTE 107 SE WASHINGTON ST SUITE 235 PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,500
NORTHWEST HOUSING ALTERNATIVES 2316 SE WILLARD ST MILWAUKIE,OR 97222	NONE	PUBLIC	GENERAL SUPPORT	4,000
OPAL CREEK ANCIENT FOREST CTR 721 NW 9TH AVE STE 236 PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	2,500
OPEN MEADOW ALTERNATIVE SCHOOL 7621 N WABASH AVE PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	5,000
OREGON ALLIANCE OF INDEP COLLEGES & UNIVERSITIES 16101 SW 72ND AVE STE 100 PORTLAND,OR 97224	NONE	PUBLIC	GENERAL SUPPORT	1,500
OREGON BALLET THEATRE 818 SE 6TH AVENUE PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	11,000
OREGON CHILDREN'S THEATRE 1939 NE SANDY BLVD PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
Total . . . . . 3a				587,350


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
OREGON COMMUNITY FDN 1221 SW YAMHILL ST STE 100 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	11,000
OREGON MUSEUM OF SCIENCE & NDUSTRY 1945 SE WATER AVE PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	28,500
OREGON NATURAL DESERT ASSOCIATION 50 SW BOND ST STE 4 BEND,OR 97702	NONE	PUBLIC	GENERAL SUPPORT	1,500
OREGON SHAKESPEARE FESTIVAL 15 SOUTH PIONEER ST ASHLAND,OR 97520	NONE	PUBLIC	GENERAL SUPPORT	8,000
OREGON SYMPHONY ASSN 921 SW WASHINGTON ST STE 200 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	15,000
OREGON ZOO FOUNDATION 4001 SW CANYON ROAD PORTLAND,OR 97221	NONE	PUBLIC	GENERAL SUPPORT	5,000
PACIFIC NORTHWEST COLLEGE OF ART 1241 NW JOHNSON STREET PORTLAND,OR 97209	NONE	COLLEGE	SCHOLARSHIP	3,000
PHAME ACADEMY 1631 NE BRAIDWAY 134 PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	1,500
PENINSULA CHILDREN'S LEARNING CENTE 4720 N MARYLAND AVENUE PORTLAND,OR 97217	NONE	PUBLIC	GENERAL PURPOSE	1,500
PEAR 338 NW 6TH AVE PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	2,000
PORTLAND ART MUSEUM 1219 SW PARK AVE PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	10,000
PORTLAND CHILDREN'S MUSEUM 4015 SW CANYON ROAD PORTLAND,OR 97221	NONE	PUBLIC	GENERAL SUPPORT	10,000
PORTLAND COMMUNITY COLLEGE FDN PO BOX 19000 PORTLAND,OR 97280	NONE	PUBLIC	GENERAL SUPPORT	1,000
PORTLAND FESTIVAL SYMPHONY PO BOX 585 PORTLAND,OR 97207	NONE	PUBLIC	GENERAL SUPPORT	1,000
PORTLAND INSTITUTE FOR CONTEMPORARY ART 415 SW 10TH AVE 300 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,000
<b>Total . . . . .</b>  <b>3a</b>				587,350

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment


Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PORTLAND OPERA ASSOCIATION 211 SE CARUTHERS ST PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	11,000
PORTLAND SYMPHONIC CHOIR PO BOX 1517 PORTLAND, OR 97207	NONE	PUBLIC	GENERAL SUPPORT	1,500
PORTLAND YOUTH PHILHARMONIC 520 SW 6TH AVE STE 820 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	1,500
PORTLAND YOUTHBUILDERS 4816 SE 92ND AVENUE PORTLAND, OR 97266	NONE	PUBLIC	GENERAL SUPPORT	3,500
PORTLAND ACTORS CONSERVATORY 1436 SW MONTGOMERY STREET PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	1,000
SCHOOLHOUSE SUPPLIES 2735 NE 82ND AVE PORTLAND, OR 97220	NONE	PUBLIC	GENERAL SUPPORT	4,000
RANDALL CHILDREN'S HOSPITAL FDN PO BOX 4484 PORTLAND, OR 97208	NONE	PUBLIC	GENERAL SUPPORT	2,000
SISTERS OF THE ROAD INC 133 NW 6TH AVENUE PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	4,500
SPECIAL OLYMPICS OREGON 5901 SW MACADAM AVENUE SUITE 200 PORTLAND, OR 97239	NONE	PUBLIC	GENERAL SUPPORT	1,000
STORE TO DOOR 7730 SW 31ST AVE PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	3,000
TEARS OF JOY THEATRE 323 NE WYGANT ST PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,000
TRIANGLE PRODUCTIONS 1785 NE SANDY BLVD PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,000
THIRD RAIL REPATORY THEA PO BOX 96063 PORTLAND, OR 97202	NONE	PUBLIC	GENERAL SUPPORT	2,500
SOMALI BANTU CITIZZEN'S GROUP PO BOX 1311 PORTLAND, OR 97075	NONE	PUBLIC	GENERAL SUPPORT	1,000
THIRD ANGLE NEW MUSIC PO BOX 28225 PORTLAND, OR 97228	NONE	PUBLIC	GENERAL SUPPORT	1,500
<b>Total . . . . .</b>  <b>3a</b>				587,350

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
WALLACE MEDICAL CONCERN 124 NE 181 ST STE 103 PORTLAND, OR 97230	NONE	PUBLIC	GENERAL SUPPORT	7,500
WESTERN RIVERS CONSERVANCY 71 SW OAK ST STE 100 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	3,000
WHITE BIRD 5620 SW EDMONT PLACE PORTLAND, OR 97239	NONE	PUBLIC	GENERAL SUPPORT	3,000
WORDSTOCK 810 SE BELMONT ST STUDIO 5 PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	3,500
WRITE AROUND PORTLAND 917 SW OAK STREET SUITE 406 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,000
YOUNG AUDIENCES OF OREGON INC 1220 SW MORRISON ST 1000 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
YWCA OF GREATER PORTLAND 1111 SW 10TH AVE PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	4,000
BODYVOX 1201 NW 17TH AVE PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	3,000
CENTRAL CITY CONCERN 232 NW 6TH AVE PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	5,000
COMMUNITY PARTNERS FOR AFFORDABLE HOUSING PO BOX 23206 TIGARD, OR 97281	NONE	PUBLIC	GENERAL SUPPORT	1,000
DE LA SALLE NORTH CATHOLIC HIGH SCHOOL 7528 N FENWICK AVE PORTLAND, OR 97217	NONE	PUBLIC	GENERAL SUPPORT	4,000
ELDERS IN ACTION 1411 SW MORRISON ST SUITE 290 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,000
NEW AVENUES FOR YOUTH 1220 SW COLUMBIA STREET PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	5,000
OUR HOUSE OF PORTLAND 2727 SE ALDER PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	5,000
OREGON HISTORICAL SOCIETY 1200 SW PARK AVE PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,000
<b>Total . . . . .</b>  <b>3a</b>				587,350




Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
OREGON PUBLIC BROADCASTING 7140 SW MACADAM AVENUE PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	7,500
PORTLAND JAZZ FESTIVAL 133 SW 2ND AVE STE 420 PORTLAND, OR 97204	NONE	PUBLIC	GENERAL SUPPORT	3,000
PLANNED PARENTHOOD OF THE COLUMBIA WILLAMETTE 3727 NE MARTIN LUTHER KING JR BLVD PORTLAND, OR 97212	NONE	PUBLIC	GENERAL SUPPORT	5,000
PORTLAND PIANO INTERNATIONAL PO BOX 6469 PORTLAND, OR 97228	NONE	PUBLIC	GENERAL SUPPORT	1,500
SMART 101 SW MARKET PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	12,000
SELF ENHANCEMENT INC3920 N KERBY AVE PORTLAND, OR 97227	NONE	PUBLIC	GENERAL SUPPORT	5,000
TUCKER-MAXON ORAL SCHOOL 2860 SE HOLGATE PORTLAND, OR 97202	NONE	PUBLIC	GENERAL SUPPORT	4,000
VOLUNTEERS OF AMERICA OREGON INC 3910 SE STARK ST PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	2,500
PORTLAND FRUIT TREE PROJECT 1912 NE KILLINGSWORTH ST PORTLAND, OR 97292	NONE	PUBLIC	GENERAL SUPPORT	2,500
ALL CLASSICAL PUBLIC MEDIA INC 515 NE 15TH AVE PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	6,000
REBUILDING TOGETHER PORTLAND 5000 N WILLAMETTE BLVD PORTLAND, OR 97203	NONE	PUBLIC	GENERAL SUPPORT	2,500
ARCHITECTUAL FOUNDATION OF OR PO BOX 40230 PORTLAND, OR 97240	NONE	PUBLIC	GENERAL SUPPORT	1,000
SOCIETY OF ST VINCENT DE PAUL PORTLAND COUNCIL PO BOX 42157 PORTLAND, OR 97242	NONE	PUBLIC	GENERAL SUPPORT	5,000
COLUMBIA RIVER MARITIME MUSEUM INC 1792 MARINE DRIVE ASTORIA, OR 97103	NONE	PUBLIC	GENERAL SUPPORT	10,000
ANGEL FLIGHT WEST INC 3161 DONALD DOUGLAS LOOP S SANTA MONICA, CA 90405	NONE	PUBLIC	GENERAL SUPPORT	3,500
<b>Total . . . . .</b>  <b>3a</b>				587,350

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SOUTHWEST COMMUNITY HEALTH 7754 SW CAPITOL HWY PORTLAND, OR 97007	NONE	PUBLIC	GENERAL SUPPORT	3,500
CRAG LAW CENTER 917 SW OAK SUITE 417 PORTLAND, OR 97205	NONE	PUBLIC	GENERAL SUPPORT	2,000
LIFT URBAN PORTLAND 11900 SW BOONES FERRY RD PORTLAND, OR 97210	NONE	PUBLIC	GENERAL SUPPORT	3,000
LIVING HOPE INTERNATIONAL PO BOX 1218 CLACKAMAS, OR 97015	NONE	PUBLIC	GENERAL SUPPORT	1,000
POTLUCK IN THE PARK 1515 SE 3RD PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	2,000
NORTHWEST DANCE PROJECT PO BOX 42488 PORTLAND, OR 97242	NONE	PUBLIC	GENERAL SUPPORT	2,000
NORTHWEST OUTWARD BOUND SCHOOL 31520 E WOODARD ROAD TROUTDALE, OR 97060	NONE	PUBLIC	GENERAL SUPPORT	2,000
MEALS ON WHEELS 7710 SW 31ST AVE PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	5,000
PITTOCK MANSION SOCIETY 3229 NW PITTOCK DRIVE PORTLAND, OR 97210	NONE	PUBLIC	GENERAL SUPPORT	7,500
NORTHWEST KIDNEY KIDS INC PO BOX 230075 PORTLAND, OR 97281	NONE	PUBLIC	GENERAL SUPPORT	1,000
PLAYWORKS PORTLAND 1125 SE MADISON SUITE 210 PORTLAND, OR 97214	NONE	PUBLIC	GENERAL SUPPORT	1,500
PORTLAND HOMELESS FAMILY SOLUTIONS 1838 SW JEFFERSON PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	5,000
NORTHWEST MOTHERS MILK BANK 417 SW 117TH AVE STE 105 PROTLAND, OR 97225	NONE	PUBLIC	GENERAL SUPPORT	1,000
WORLD SALMON COUNCIL PO BOX 80311 PORTLAND, OR 97280	NONE	PUBLIC	GENERAL SUPPORT	3,500
DEFUNKT THEATER 4319 SE HAWTHORNE BLVD PORTLAND, OR 97215	NONE	PUBLIC	GENERAL SUPPORT	1,000
<b>Total . . . . .</b>  <b>3a</b>				587,350

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
FRIENDS OF TREES 3117 NE MLK JR BLVD PORTLAND, OR 97212	NONE	PUBLIC	GENERAL SUPPORT	2,500
WHEEL TO WALK FOUNDATION PO BOX 20146 PORTLAND, OR 97294	NONE	PUBLIC	GENERAL SUPPORT	1,500
MITTLEMAN JEWISH COMMUNITY CENTER 6651 SW CAPITOL HWY PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	5,000
INNOVATIVE CHANGES 2010 LLOYD CENTER PORTLAND, OR 97232	NONE	PUBLIC	GENERAL SUPPORT	1,000
SUSAN G KOMEN OREGON & SW WASHINGTO 1500 SW 1ST AVE STE 270 PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	6,500
CHILDADVOCATES INC 1001 MOLALLA AVE SUITE 203 OREGON CITY, OR 97045	NONE	PUBLIC	GENERAL SUPPORT	4,000
OREGON COMMUNITY WAREHOUSE 3969 NE ML KING BLVD PORTLAND, OR 97212	NONE	PUBLIC	GENERAL SUPPORT	5,000
NORTHWEST PILOT PROJECT 1430 SW BROADWAY SUITE 200 PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	2,500
REFIT PO BOX 8353 PORTLAND, OR 97207	NONE	PUBLIC	GENERAL SUPPORT	3,000
UNION GOSPEL MISSION 3 NW THIRD AVENUE PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	7,500
THE NW CATHOLIC COUNSELING CENTER 8383 NE SANDY BLVD 205 PORTLAND, OR 97220	NONE	PUBLIC	GENERAL SUPPORT	2,000
PENDULUM AERIAL ARTS 2525 SW PATTON ROAD PORTLAND, OR 97201	NONE	PUBLIC	GENERAL SUPPORT	2,000
GALES CREEK CAMP FOUNDATION 7110 SW FIR LOOP STE 170 PORTLAND, OR 97223	NONE	PUBLIC	GENERAL SUPPORT	2,000
GIRL SCOUTS OF OR & SW WA COLUMBIA RIVER COUNCIL 9620 SW BARBUR BLVD PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	3,100
ST ANDREW LEGAL CLINIC 807 NE ALBERTA STREET PORTLAND, OR 97211	NONE	PUBLIC	GENERAL SUPPORT	2,500
<b>Total . . . . .</b>  <b>3a</b>				587,350

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PORTLAND JAPANESE GARDEN PO BOX 3847 PORTLAND, OR 97208	NONE	PUBLIC	GENERAL SUPPORT	2,000
PROFILE THEATRE PO BOX 14845 PORTLAND, OR 97293	NONE	PUBLIC	GENERAL SUPPORT	5,000
WESTWIND STEWARDSHIP GROUP PO BOX 408 OTIS, OR 97368	NONE	PUBLIC	GENERAL SUPPORT	6,000
TSA WEST WOMEN'S & CHILDRENS SHELTER 2010 NW KEARNEY STREET PORTLAND, OR 97209	NONE	PUBLIC	GENERAL SUPPORT	2,000
READING RESULTS 3115 NE SANDY BLV PORTLAND, OR 97219	NONE	PUBLIC	GENERAL SUPPORT	2,500
AC PORTLAND 5055 N GREELEY AVE PORTLAND, OR 97217	NONE	PUBLIC	GENERAL SUPPORT	1,500
OUR UNITED VILLAGES 3625 N MISSISSIPPI AVE PORTLAND, OR 97227	NONE	PUBLIC	GENERAL SUPPORT	1,500
SATURDAY ACADEMY 5000 N WILLAMETTE BOULEVARD PORTLAND, OR 97203	NONE	PUBLIC	GENERAL SUPPORT	4,000
<b>Total . . . . .</b>			<b>3a</b>	587,350

**TY 2013 Accounting Fees Schedule****Name:** THE JACKSON FOUNDATION 97305070**EIN:** 93-6020752

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	1,500			1,500

**TY 2013 Investments Corporate  
Bonds Schedule**

**Name:** THE JACKSON FOUNDATION 97305070  
**EIN:** 93-6020752

Name of Bond	End of Year Book Value	End of Year Fair Market Value
NUVEEN FUNDS CORE BD FD I	2,068,584	2,105,107

**TY 2013 Investments Corporate  
Stock Schedule****Name:** THE JACKSON FOUNDATION 97305070**EIN:** 93-6020752

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ROWE T PRICE MID-CAP GROWTH FD	953,144	1,112,978
RUSSELL EMERGING MARKETS CL S	300,000	249,505
T ROWE PRICE GROWTH STK #40	1,385,216	2,289,069
LAUDUS INTL MARKETMASTERS	745,228	1,135,925
AMERICAN EUROPACIFIC GRTH	680,539	955,940
PIMCO TOTAL RETURN FUND	1,724,542	1,674,666
NUVEEN INFLATION PRO SEC FD	293,658	286,834
NUVEEN REAL ESTATE SECS	340,431	433,228
NUVEEN SANTA BARBARA DIV GRWTH	574,094	880,295
T ROWE PRICE SC STOCK	575,543	805,321
VANGUARD EQUITY INCOME	1,419,420	2,066,589

TY 2013 Other Decreases Schedule

**Name:** THE JACKSON FOUNDATION 97305070

**EIN:** 93-6020752

Description	Amount
ROUNDING ADJUSTMENT	1



## TY 2013 Other Expenses Schedule

**Name:** THE JACKSON FOUNDATION 97305070

**EIN:** 93-6020752

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE CHARITABLE FILING FEE	1,170	0		1,170
GRANTMAKERS RENEWAL	2,423	0		2,423
SPIRE TECHNOLOGIES	1,445	0		1,445

**TY 2013 Taxes Schedule****Name:** THE JACKSON FOUNDATION 97305070**EIN:** 93-6020752

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX PAYMENT - PRIOR YE	1,785	0		0
FEDERAL ESTIMATES - PRINCIPAL	14,772	0		0
FOREIGN TAXES ON QUALIFIED FOR	4,006	4,006		0