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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 ▶ Do not enter social security numbers on this form as it may be made public.
 ▶ Go to <u>www.irs.gov/Form990PF</u> for instructions and the latest information. 2020

Open to Public Inspection

or	caler	ndar year 2020, or tax year beginning 07-01-20)20 , ar	nd ending 06-30-	-2021	
		Indation OUNDATION		A Employer id	entification numbe	r
		N FNDTN JASON LAETZ		95-4413799		
Num	ber and	d street (or P.O. box number if mail is not delivered to street address) 385001 MAILSTOP B5B	Room/suite	B Telephone nu	ımber (see instruction	ns)
, ,	J BOX (NOTIFICATION BUD		(615) 725-5924	4	
		n, state or province, country, and ZIP or foreign postal code TN 370765001	•	C If exemption	application is pendin	g, check here
						• ∟
G Cł	neck al	I that apply: Initial return Initial return of a	former public charity		ganizations, check he	▶ ∟
		Final return Amended return			rganizations meeting :k here and attach coi	
		☐ Address change ☐ Name change	.	E If private fo	undation status was t	erminated
_		rpe of organization: Section 501(c)(3) exempt private in 4947(a)(1) nonexempt charitable trust	foundation e private foundation	under section	on 507(b)(1)(A), chec	k here 🕨 🗀
		. , , , ,	Cash 🗹 Accru	E If the found:	ation is in a 60-month	a termination
of '	year (f	from Part II, col. (c), ▶\$ 12,689,224 (Part I, column (d) must			n 507(b)(1)(B), chec	
			ne on cash basis.)		T	Т
Pa	rt I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received (attach schedule)	500			
	2	Check ► ✓ if the foundation is not required to attach	300			
	3	Sch. B Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	423,089	423,089		
	5а	Gross rents	,	,		
	b	Net rental income or (loss)				
<u>e</u>	6a	Net gain or (loss) from sale of assets not on line 10	312,854			
Revenue	b	Gross sales price for all assets on line 6a				
Re	7	1,496,323 Capital gain net income (from Part IV, line 2)		312,854		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	C	Gross profit or (loss) (attach schedule)	65.1 2.702	2.702		
	11	Other income (attach schedule)	2,783	·		
	12	Total. Add lines 1 through 11	739,226	738,726		
	13	Compensation of officers, directors, trustees, etc. Other employee salaries and wages	0			
	14 15	Other employee salaries and wages				
Se	16a	Legal fees (attach schedule)				
<u></u>	b	Accounting fees (attach schedule)	10,046	5,023	0	5,023
Ä	c	Other professional fees (attach schedule)	20,056	· ·		-,
ΙŃΕ	17	Interest		<u> </u>		
tra t	18	Taxes (attach schedule) (see instructions)	9 14,519			85
<u> </u>	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
Ž	21	Travel, conferences, and meetings				
ang	22	Printing and publications				
Ď.	23	Other expenses (attach schedule)	9 483			483
Operating and Administrative Expenses	24	Total operating and administrative expenses.				
<u>8</u>		Add lines 13 through 23	45,104	, i	0	· '
ر	25	Contributions, gifts, grants paid	1,362,000			1,362,000
	26	Total expenses and disbursements. Add lines 24 and 25	1,407,104	25,079	0	1,367,591
	27	Subtract line 26 from line 12:				
	а	Excess of revenue over expenses and disbursements	-667,878			
	b	Net investment income (if negative, enter -0-)	231,370	713,647		
	С	Adjusted net income (if negative, enter -0-)				
			î	i		

1 2 3 4	Balance Sheets Attached schedules and amounts in the descript should be for end-of-year amounts only. (See in Cash—non-interest-bearing Savings and temporary cash investments Accounts receivable	nstructions.)	Beginning of year (a) Book Value 14,449	(b) Book	End o « Value	f year (c) Fair Market Value
3	Cash—non-interest-bearing			(D) BOOR	Value	(C) Fall Market Value
3	Savings and temporary cash investments	-			15,629	15,629
3					/	
	Accounts receivable P	· · ·				
4	Less: allowance for doubtful accounts ▶					
4		-				
	Pledges receivable					
_	Less: allowance for doubtful accounts ▶	-				
5	Grants receivable					
6	Receivables due from officers, directors, trustees, and other					
	disqualified persons (attach schedule) (see instructions)	<u> </u>				
7	Other notes and loans receivable (attach schedule)					
	Less: allowance for doubtful accounts ▶					
<u>د</u> 8	Inventories for sale or use	[
8 9 9 10a	Prepaid expenses and deferred charges	[
₹ 10a	Investments—U.S. and state government obligations (attach	schedule)	8,248,930	% j	8,015,650	8,015,650
b	Investments—corporate stock (attach schedule)	[2,190,053	% J	2,652,385	2,652,385
C	Investments—corporate bonds (attach schedule)	[1,900,254	% J	2,005,560	2,005,560
11	Investments—land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation (attach schedule)					
12	Investments—mortgage loans					
13	Investments—other (attach schedule)					
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	/ 				
1.0	instructions. Also, see page 1, item I)		12,353,686		12,689,224	12,689,224
+						12,009,224
17		<u> </u>	0		0	
_√ 18		-				
ė 19 =		L				
30 19 20 21	•	⊢				
등 21						
_ 22	Other liabilities (describe -)				
23	Total liabilities(add lines 17 through 22)		0		0	
Fund Balances	Foundations that follow FASB ASC 958, check here ▶ and complete lines 24, 25, 29 and 30.					
	Net assets without donor restrictions					
을 24 음						
B 25	Net assets with donor restrictions	· · · <u>·</u> -				
اجَ	Foundations that do not follow FASB ASC 958, check he	ere 🕨 🗹 📗				
<u> </u>	and complete lines 26 through 30.					
Assets or 26 27 28	Capital stock, trust principal, or current funds	[
ਲ 27	Paid-in or capital surplus, or land, bldg., and equipment fund					
€ 28	Retained earnings, accumulated income, endowment, or other	er funds	12,353,686		12,689,224	
<u>29</u>	Total net assets or fund balances (see instructions)	[12,353,686		12,689,224	
30	Total liabilities and net assets/fund balances (see instru	ıctions) .	12,353,686		12,689,224	
Part I	Analysis of Changes in Net Assets or Fund Bala	nces				
	otal net assets or fund balances at beginning of year—Part II, colf-year figure reported on prior year's return)	umn (a), line	29 (must agree with	end- • 1		12,353,686
2 Er	nter amount from Part I, line 27a			. 2		-667,878
3 O	ther increases not included in line 2 (itemize)		<u>\</u>	3		1,006,381
	dd lines 1, 2, and 3			. 4		12,692,189
	ecreases not included in line 2 (itemize)			5		2,965
6 To	otal net assets or fund balances at end of year (line 4 minus line	5)—Part II, co	olumn (b), line 29	. 6		12,689,224

Page **3**

		kind(s) of property sold (e.g., use; or common stock, 200 sh		(b) How acquir P—Purchas D—Donatio	se	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)	
	PUBLICLY TRADED SECURITIE			Р				
	PUBLICLY TRADED SECURITIE	<u>S</u>		Р				
	CAPITAL GAIN DIVIDENDS			P				
	CAPITAL GAIN DIVIDENDS			P				
е		T						
	(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	1,114,991			915	,802		199,189	
b	290,009	,		267	7,667		22,342	
С							91,323	
d							91,323	
e								
							_	
	Complete only for assets show	ving gain in column (h) and ov	vned by the foundation				I)	
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		(k) ess of col. (i) col. (j), if any		col. (k), but not	h) gain minus less than -0-) or om col.(h))	
а							199,189	
b							22,342	
С								
d								
e								
2	Capital gain net income or (n Net short-term capital gain o	. , ,	If gain, also enter in If (loss), enter -0- in 1222(5) and (6):		}	2	312,854	
	If gain, also enter in Part I, li in Part I, line 8	ne 8, column (c) (see instruct			}	3	0	
Part	If gain, also enter in Part I, li in Part I, line 8 V Qualification Unde	ne 8, column (c) (see instruct	educed Tax on N	et Investmen	}		0	
Part SECTI	If gain, also enter in Part I, li in Part I, line 8 V Qualification Unde ON 4940(e) REPEALED	ne 8, column (c) (see instruct	educed Tax on N	et Investmen	} L		0	
Part SECTI	If gain, also enter in Part I, li in Part I, line 8 V Qualification Unde ON 4940(e) REPEALED Reserved	r Section 4940(e) for RON DECEMBER 20, 2019	educed Tax on N 9 - DO NOT COMI	et Investmen	} L	ome	0	
Part SECTI	If gain, also enter in Part I, li in Part I, line 8 V Qualification Unde ON 4940(e) REPEALED	ne 8, column (c) (see instruct	educed Tax on N	et Investmen	} L		0	
Part SECTI	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under ION 4940(e) REPEALED Reserved (a)	r Section 4940(e) for RON DECEMBER 20, 2019	educed Tax on N O - DO NOT COMI	et Investmen	t Ince	ome (d)	0	
Part SECTI	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under ION 4940(e) REPEALED Reserved (a)	r Section 4940(e) for RON DECEMBER 20, 2019	educed Tax on N O - DO NOT COMI	et Investmen	t Ince	ome (d)	0	
Part SECTI	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under ION 4940(e) REPEALED Reserved (a)	r Section 4940(e) for RON DECEMBER 20, 2019	educed Tax on N O - DO NOT COMI	et Investmen	t Inco	ome (d)	0	
Part SECTI	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under ION 4940(e) REPEALED Reserved (a)	r Section 4940(e) for RON DECEMBER 20, 2019	educed Tax on N O - DO NOT COMI	et Investmen	t Inco	ome (d)	0	
Part SECTI 1	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under CON 4940(e) REPEALED Reserved (a) Reserved	ne 8, column (c) (see instruct	educed Tax on N O - DO NOT COMI (c) Reserve	et Investmen	t Inco	ome (d)	0	
Part SECTI 1	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under CON 4940(e) REPEALED Reserved (a) Reserved	r Section 4940(e) for RON DECEMBER 20, 2019	educed Tax on N O - DO NOT COMI (c) Reserve	et Investmen	t Inco	ome (d)	0	
Part SECTI 1	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under CON 4940(e) REPEALED Reserved (a) Reserved	r Section 4940(e) for Roon DECEMBER 20, 2019 (b) Reserved	educed Tax on N 9 - DO NOT COMI (c) Reserve	et Investmen PLETE		ome (d)	0	
Part SECTI 1	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under ION 4940(e) REPEALED Reserved (a) Reserved Reserved Reserved Reserved Reserved	r Section 4940(e) for Roon DECEMBER 20, 2019 (b) Reserved	educed Tax on N 9 - DO NOT COMI (c) Reserve	et Investmen PLETE ed	2	ome (d)	0	
Part SECTI 1 1 2 4 5 4 6 4 6 4 6 6 4 6 6 6 6 6 6 6 6 6 6	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under CON 4940(e) REPEALED Reserved (a) Reserved Reserved Reserved Reserved Reserved Reserved Reserved	r Section 4940(e) for Roon DECEMBER 20, 2019 (b) Reserved	educed Tax on N 9 - DO NOT COMI (c) Reserve	et Investmen PLETE ed	2 2	ome (d)	0	
Part SECTI 1 2 F 3 F 4 F 5 F	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under CON 4940(e) REPEALED Reserved (a) Reserved	r Section 4940(e) for Roon DECEMBER 20, 2019 (b) Reserved	educed Tax on N 9 - DO NOT COMI (c) Reserve	et Investmen PLETE ed	2 2 3 4 5	ome (d)	0	
Part SECTI 1	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under ION 4940(e) REPEALED Reserved (a) Reserved	r Section 4940(e) for Roon DECEMBER 20, 2019 (b) Reserved	educed Tax on N 9 - DO NOT COMI (c) Reserve	et Investmen PLETE ed	2	ome (d)		
Part SECTI 1 1 2 5 6 6 6 7 6	If gain, also enter in Part I, li in Part I, line 8 V Qualification Under ION 4940(e) REPEALED Reserved (a) Reserved	r Section 4940(e) for Roon DECEMBER 20, 2019 (b) Reserved	educed Tax on N 9 - DO NOT COMI (c) Reserve	et Investmen PLETE ad	2 2 3 4 5	ome (d)		

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Pai	t VII-B	Statements Regard	ling Activities for Whicl	h Form 4720 May Be	Required (continued)				
5a	During the	year did the foundation p	pay or incur any amount to:					Yes	No
	(1) Carry (on propaganda, or otherw	rise attempt to influence legis	lation (section 4945(e))?	☐ Yes 🔽	7 No			
	(2) Influer	ice the outcome of any sp	pecific public election (see sec	ction 4955); or to carry	L les L	- NO			
	on, dire	ectly or indirectly, any vot	ter registration drive?		· · 🔲 Yes 🔽	No			
	(3) Provide	e a grant to an individual	for travel, study, or other sin	nilar purposes?	Yes V	a I			
	(4) Provide	e a grant to an organization	on other than a charitable, et	c., organization described		_ NO			
	in secti	ion 4945(d)(4)(A)? See in	nstructions		· · □ Yes 🔽	7 No.			
	(5) Provide	e for any purpose other th	nan religious, charitable, sciei	ntific, literary, or		- '' '			
	educat	ional purposes, or for the	prevention of cruelty to child	lren or animals?	🗌 Yes 🔽	No			
b	If any ansv	ver is "Yes" to 5a(1)-(5),	did any of the transactions f	ail to qualify under the ex	ceptions described in	_ NO			
	Regulations	s section 53.4945 or in a	current notice regarding disa	ster assistance? See instr	uctions		5b		
	Organizatio	ons relying on a current n	otice regarding disaster assis	tance check here	▶ ┌	7 F			
C	If the answ	er is "Yes" to question 5a	a(4), does the foundation claim	m exemption from the		_			
	tax becaus	e it maintained expenditu	re responsibility for the grant	t?	· · 🔲 Yes	□ No □			
	If "Yes," at	tach the statement requir	red by Regulations section 53	.4945-5(d).	∟ res ∟	_ NO			
6 a	Did the fou	ndation, during the year,	receive any funds, directly o	r indirectly, to pay premi	ums on				
						7 l			
b			pay premiums, directly or in-		L Yes ⊻	∐ No	6b		No
		6b, file Form 8870.	F, F	,, p					
7a		·	s the foundation a party to a	prohibited tax shelter tra	nsaction?	.			
b		-	any proceeds or have any net		I I YES IV	∐ No	7b		
8			tion 4960 tax on payment(s)				-		
_		· •	ne year?			.			
					Yes V				
Pai		Information About C and Contractors	Officers, Directors, Trus	tees, Foundation Ma	anagers, Hignly Paid i	mploye	ees,		
1	List all off	icers, directors, trustee	es, foundation managers a			1			
	(a) Nar	me and address	(b) Title, and average hours per week	(c) Compensation (If not paid, enter	(d) Contributions to employee benefit plans ar	nd (e) E			
	(=)		devoted to position	-0-)	deferred compensation	oth	er all	owanc	es
See A	Additional Da	ata Table							
2	Compensa	tion of five highest-pai	id employees (other than t	those included on line :	l—see instructions). If n	one, ent	er "N	IONE.	"
					(d) Contributions to				
(a)		ddress of each employee	paid (b) Title, and average hours per week	(c) Compensation	employee benefit	(e) Ex			
	mo	re than \$50,000	devoted to position	(c) componication	plans and deferred compensation	othe	er allo	wance	es
					Compensation				
						+			
						-			
						1			
						1			
Tota	l number of	other employees paid ove	er \$50,000 		.				0
						Form	990	-PF (2020)

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	Employees,
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "No	ONE".
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
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 instructions.	
3	_
Total. Add lines 1 through 3	•

2c

3

4

5

6

7

1a

1b

2

3a 3b

4

5

9.920

610,002

610.002

610.002

1,367,591

1,367,591

1,367,591

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

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

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

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

income. Enter 1% of Part I, line 27b. See instructions.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for

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

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

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Qualifying Distributions (see instructions)

Amounts set aside for specific charitable projects that satisfy the:

the section 4940(e) reduction of tax in those years.

3

4 5

6

1

2

3

4

5

b

Part XII

610,002

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Part	XIII	

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90-PF (20	020)	
XIII	Undistributed Income	(see instructions)

- a Enter amount for 2019 only. **b** Total for prior years: 2018, 2017, 2016 3 Excess distributions carryover, if any, to 2020:
- a From 2015. **b** From 2016. c From 2017. . . .

1 Distributable amount for 2020 from Part XI, line 7

2 Undistributed income, if any, as of the end of 2020:

- d From 2018.
- e From 2019.
- f Total of lines 3a through e.

(a)

Corpus

597.097

597,097

597,097

597.097

(b)

Years prior to 2019

(c)

2019

160,492

160,492

- XII, line 4: ► \$ 1,367,591

- 4 Qualifying distributions for 2020 from Part a Applied to 2019, but not more than line 2a **b** Applied to undistributed income of prior years (Election required—see instructions). c Treated as distributions out of corpus (Election

same amount must be shown in column (a).)

required—see instructions).

d Applied to 2020 distributable amount. . . . e Remaining amount distributed out of corpus

5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the

a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5

6 Enter the net total of each column as

b Prior years' undistributed income. Subtract 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. **d** Subtract line 6c from line 6b. Taxable amount —see instructions e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions) . . .

9 Excess distributions carryover to 2021.

10 Analysis of line 9: a Excess from 2016. . . **b** Excess from 2017. . c Excess from 2018. . . . d Excess from 2019. . . e Excess from 2020. . .

Subtract lines 7 and 8 from line 6a

indicated below:

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

factors:

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Part XV Supplementary Informa	ation (continued)			
3 Grants and Contributions Paid	d During the Year or Appr	oved for Futur	re Payment	
Recipient	If recipient is an individual, show any relationship to	how any relationship to Foundation Purpose of		Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	contribution	Amount
a Paid during the year		<u> </u>		
See Additional Data Table	<u> </u>	<u> '</u>	<u> </u>	<u> </u>
Total			▶ 3a	1,362,000
b Approved for future payment				
Total			▶ 3b	

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er gross amounts unless otherwise indicated.	Unrelated b	usiness income	Excluded by section	n 512, 513, or 514	(e) Related or exempl
Program service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	function income (See instructions.)
a					
.					
·					
Fees and contracts from government agencies					
Membership dues and assessments					
Interest on savings and temporary cash nvestments					
Dividends and interest from securities			14	423,089	
Net rental income or (loss) from real estate:				·	
Debt-financed property					
Not debt-financed property					
Net rental income or (loss) from personal property					
Other investment income					
Gain or (loss) from sales of assets other than nventory					
·			18	312,854	
Net income or (loss) from special events: Gross profit or (loss) from sales of inventory					
Other revenue:					
OTHER INCOME			14	2,783	
)			17	2,703	
i					
e Subtotal. Add columns (b), (d), and (e)				738,726	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcu	ılations.)			738,726 3	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculated the columns of the columns (see worksheet in line 13 instructions to verify calculated the columns of the	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second of t	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculart XVI-B Relationship of Activities to the second s	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculart XVI-B Relationship of Activities to the second s	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second of t	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcurt XVI-B Relationship of Activities to the second sec	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
Subtotal. Add columns (b), (d), and (e). Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calcular XVI-B Relationship of Activities to the second se	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	
ne No. Explain below how each activity for which the accomplishment of the foundation's expressions.	ilations.) ne Accomplisi income is report	nment of Exem	pt Purposes f Part XVI-A contribu	3	738,726

Part XVII	Information R Exempt Organ		ransfers	Тоа	and 1	Γran	sactio	ons and F	Relatio	nsh	ips \	With I	Nonc	harit	able	
B. L.		12					11.1									

Part XVII	Exempt Organia	zations				•			
	panization directly or in- chan section 501(c)(3)						tion 501	Yes	No
a Transfers f	rom the reporting foun	dation to a nonch	naritable ex	empt organization	of:				
(1) Cash.							. 1a(1)	No
(2) Other	assets						1a(2)	No
b Other trans	sactions:								
	of assets to a nonchari						1b(1)	No
(2) Purcha	ases of assets from a n	oncharitable exe	mpt organi:	zation			1b(2)	No
(3) Renta	l of facilities, equipmer	it, or other asset	s				1b(3	_	No
(4) Reimb	oursement arrangemen	ts					. 1b(4	' —	No
` .	or loan guarantees.						1b(5	_	No
` .	mance of services or m	·	_				1b(6)	No
-	facilities, equipment, n								No
of the good	ver to any of the above ds, other assets, or serv saction or sharing arra (b) Amount involved	vices given by th	e reporting n column (d	foundation. If the d) the value of the	foundation recei goods, other as	ved less than fair ma	erket value eived.	angomon	nte
,a) Line No.	(b) Amount involved	(c) Name or nonc	паптаріе ехе	empt organization	(a) Description	or transfers, transaction:	s, and snaring arr	angemen	its
2a Is the foun	dation directly or indire	ectly affiliated wit	h, or relate	ed to, one or more	tax-exempt orga	nizations	_		
described i	n section 501(c) (other	than section 50	1(c)(3)) or	in section 527? .		L	Yes 🔽 No		
b If "Yes," co	mplete the following so	chedule.	_						
	(a) Name of organization	n	(b) Type of organization	on	(c) Descriptio	on of relationship		
of my which	er penalties of perjury, y knowledge and belief n preparer has any kno	, it is true, correc							
Sign Here	*****			2021-11-15	*****		May the IRS return with the prep		
S	Signature of officer or to	rustee		Date	Title		below (see instr.)	√ Yes □	□No
	Print/Type preparer's	name Pre	parer's Sig	nature	Date	Check if self-	PTIN P0123	1617	
Paid	Stephanie Wilkinso	n			2021-11-15	employed ▶ Ш	. 5 - 2 -		
Preparer Jse Only		THOUSE CARLIN					Firm's EIN ▶		
		11 TOWNSGATE					Phone no (90	5) 274. (8555
	WE	ESTLAKE VILLAG	E, CA 9136	51			Phone no. (80	J) J/4-6	0000

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation (a) Name and address Title, and average (c) Compensation (If (d) Expense account, hours per week not paid, enter Contributions to (e) other allowances (b) devoted to position -0-) employee benefit plans and deferred compensation ANDREW J TAVI PRESIDENT/DIRECTOR 0 0 ONE NISSAN WAY FRANKLIN, TN 37067 HOLLY BRACCO 0 0 DIRECTOR 0 1.0 39001 SUNRISE DRIVE FARMINGTON HILLS, MI 48331 LORI A MCPHERSON 0 0 0 SECRETARY/DIRECTOR 1.0 ONE NISSAN WAY FRANKLIN, TN 37067 ALLESANDRA THARP DIRECTOR 0 0 0 1.0 9800 CAMPUS POINT DRIVE SAN DIEGO, CA 92121 **BRYAN HORN** DIRECTOR 0 0 0 ONE NISSAN WAY FRANKLIN, TN 37067 CALANDRA TURNER DIRECTOR 0 0 0 1.0 ONE NISSAN WAY FRANKLIN, TN 37067 PARUL BAJAJ 0 0 **EXECUTIVE** 0 DIRECTOR/DIRECTOR ONE NISSAN WAY FRANKLIN, TN 37067 FRED DEPEREZ DIRECTOR (THRU 0 0 0 7/15/2020) ONE NISSAN WAY 1.0 FRANKLIN, TN 37067 JEFFREY MILLS 0 0 0 DIRECTOR 1.0 ONE NISSAN WAY FRANKLIN, TN 37067 **ERIKA SANTOS** DIRECTOR (THRU 0 0 0 1/11/2021) ONE NISSAN WAY 1.0 FRANKLIN, TN 37067 RODNEY FRANCIS DIRECTOR (THRU 0 0 12/4/2020) ONE NISSAN WAY 1.0 FRANKLIN, TN 37067 JASON LAETZ TREASURER/DIRECTOR 0 0 0 1.0 ONE NISSAN WAY FRANKLIN, TN 37067 JEREMIE H PAPIN DIRECTOR 0 0 0 1.0 ONE NISSAN WAY FRANKLIN, TN 37067 TRAVIS PARMAN DIRECTOR 0 0 0 1.0 ONE NISSAN WAY FRANKLIN, TN 37067 SHISHIR BHUSHAN DIRECTOR 0 0 1.0 ONE NISSAN WAY

FRANKLIN, TN 37067

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year ARAB COMMUNITY CENTER FOR NONE PC GENERAL SUPPORT 30,000 **ECONOMIC & SOCIAL SERVIC** 2651 SAULINO CT DEARBORN, MI 48120

ATLANTA HISTORICAL SOCIETY INC 130 WEST PACES FERRY RD ATLANTA, GA 30305	NONE	PC	GENERAL SUPPORT	50,000
AUTRY NATIONAL CENTER 4700 WESTERN HERITAGE WAY LOS ANGELES, CA 900271462	NONE	PC	GENERAL SUPPORT	30,000

Total . .

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year BROOKLYN HISTORICAL SOCIETY NONE PC GENERAL SUPPORT 10,000 120 DIEDDEDONT CT

BROOKLYN, NY 11201				
BROOKLYN PUBLIC LIBRARY 10 GRAND ARMY PL BROOKLYN, NY 11238	NONE	PC	GENERAL SUPPORT	10,000
CATHOLIC CHARITIES OF THE ARCHDIOCESE OF ATLANTA	NONE	PC	GENERAL SUPPORT	20,000

BROOKLYN, NY 11238				
CATHOLIC CHARITIES OF THE ARCHDIOCESE OF ATLANTA 2401 LAKE PARK DR SMYRNA, GA 30080	NONE	PC	GENERAL SUPPORT	20,000
Total			> 3a	1,362,000

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year CHILDREN'S MUSEUM CORPORATION OF I NONE PC GENERAL SUPPORT 120,000 RUTHERFORD COUNTY 502 SOUTHEAST BROAD ST

MURFREESBORO, TN 37130

300 N HOUSTON ST DALLAS, TX 75202

Total .

, , , , , , , , , , , , , , , , , , ,				
CLEVELAND MUSIC FOUNDATIONGRAMMY MUSEUM 800 W SUNFLOWER RD CLEVELAND, MS 38732	NONE	PC	GENERAL SUPPORT	55,000
DALLAS HOLOCAUST MUSEUM	NONE	PC	GENERAL SUPPORT	15,000

3a

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year DETROIT EDUCATIONAL TELEVISION NONE PC GENERAL SUPPORT 50,000 FOUNDATION RILEY BROADCAST CENTER 1 CLOVER CT 00

WIXOM, MI	48393				
FERNBANK : ATLANTA, G	INC767 CLIFTON RD NE A 30307	NONE	PC	GENERAL SUPPORT	50,000
FOUNDATIC HISTORY	ON FOR MISSISSIPPI	NONE	SO III FI	GENERAL SUPPORT	30,000

ATLANTA, GA 30307	NONE	PC	GENERAL SUPPORT	30,00
FOUNDATION FOR MISSISSIPPI HISTORY PO BOX 571	NONE	SO III FI	GENERAL SUPPORT	30,000

Total .

FOUNDATION FOR MISSISSIPPI HISTORY PO BOX 571 JACKSON, MS 39205	NONE	SO III FI	GENERAL SUPPORT	30,000

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year GLOBAL EDUCATION CENTER NONE PC GENERAL SUPPORT 50,000 4822 CHARLOTTE AVE NASHVILLE, TN 372093423

HOLOCAUST MEMORIAL CENTER ZEKELMAN FAMILY 28123 ORCHARD LAKE RD FARMINGTON HILLS, MI 48334	NONE	PC	GENERAL SUPPORT	40,000
JAPANESE AMERICAN NATIONAL MUSEUM	NONE	PC	GENERAL SUPPORT	60,000

FARMINGTON HILLS, MI 48334				
JAPANESE AMERICAN NATIONAL MUSEUM 100 NORTH CENTRAL AVE LOS ANGELES, CA 90012	NONE	PC	GENERAL SUPPORT	60,000

1,362,000

	JAPANESE AMERICAN NATIONAL MUSEUM 100 NORTH CENTRAL AVE LOS ANGELES, CA 90012	NONE	PC	GENERAL SUPPORT	60,00
4	·		l		

Total . .

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor

	or substantial continuator			
a Paid during the year				
JEWISH CHILDREN'S MUSEUM 792 EASTERN PARKWAY	NONE	PC	GENERAL SUPPORT	40,000

BROOKLYN, NY 11213				
JEWISH MUSEUM1109 FIFTH AVE New York, NY 10128	NONE	PC	GENERAL SUPPORT	50,000
JOBS FOR MISSISSIPPI GRADUATES	NONE	PC	GENERAL SUPPORT	25,000

New York, NY 10128				
JOBS FOR MISSISSIPPI GRADUATES INC 6055 RIDGEWOOD RD STE A JACKSON, MS 39211	NONE	PC	GENERAL SUPPORT	25,000

JOBS FOR MISSISSIPPI GRADUATES INC 6055 RIDGEWOOD RD STE A JACKSON, MS 39211	NONE	PC	GENERAL SUPPORT	25,000
Total			> 3a	1,362,000

Recipient

Name and address (home or business)

Recipient

If recipient is an individual, show any relationship to any foundation manager or substantial contributor

Recipient

Foundation status of recipient

recipient

Purpose of grant or contribution

recipient

a Paid during the year

NONE

NASHVILLE PUBLIC LIBRARY

Total .

FOUNDATION 615 CHURCH ST NASHVILLE, TN 37219				,3,666
NASHVILLE PUBLIC TELEVISION	NONE	PC	GENERAL SUPPORT	150,000

SO III FI

GENERAL SUPPORT

75 000

161 RAINS AVE NASHVILLE, TN 37203	NONE	PC	GENERAL SUPPORT	150,000
OASIS CENTER 1704 CHARLOTTE AVE STE 200 NASHVILLE, TN 37203	NONE	PC	GENERAL SUPPORT	100,000

NONE

ONE TO WORLD INC

Total .

NEW YORK, NY 10001				
SAN DIEGO CHILDREN'S DISCOVERY MUSEUM 320 N BROADWAY	NONE	PC	GENERAL SUPPORT	20,000

PC

GENERAL SUPPORT

45,000

MUSEUM 320 N BROADWAY ESCONDIDO, CA 92025				
SAN DIEGO MUSEUM OF MAN 1350 EL PRADO SAN DIEGO, CA 92101	NONE	PC	GENERAL SUPPORT	30,000

Recipient If recipient is an individual, Purpose of grant or Foundation Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year STARS NASHVILLE NONE PC GENERAL SUPPORT 40,000 1704 CHARLOTTE AVE STE 200 NASHVILLE, TN 37203 TANENBAUM CENTER FOR NONE PC GENERAL SUPPORT 67,000

INTERRELIGIOUS UNDERSTANDING 55 BROAD ST 17TH FL NEW YORK, NY 10004				·
TENNESSEE IMMIGRANT & REFUGEE RIGHTS COALITION 2195 NOLENSVILLE PIKE	NONE	PC	GENERAL SUPPORT	25,000

3a

1,362,000

NASHVILLE, TN 37211

Total .

Recipient If recipient is an individual, Foundation Purpose of grant or Amount show any relationship to status of contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year THE COMMUNITY HOUSE NONE PC GENERAL SUPPORT 10,000 380 SOUTH BATES ST BIRMINGHAM, MI 48009 THE INTERFAITH LEADERSHIP COUNCIL NONE PC GENERAL SUPPORT 25,000

10821 CAPITAL OAK PARK, MI 48237				
US COMMITTEE FOR REFUGEES AND IMMIGRANTS INC 2231 CRYSTAL DR STE 350 ARLINGTON, VA 222023794	NONE	PC	GENERAL SUPPORT	20,000

Total .

3a

Recipient If recipient is an individual, Foundation Purpose of grant or Amount contribution show any relationship to status of any foundation manager recipient

والمطرية والمراجع المراجع مطموا والمراجع

Name and address (home or business)

	or substantial contributor			
a Paid during the year				
YWCA NASHVILLE & MIDDLE	NONE	PC	GENERAL SUPPORT	20,000

NONE	PC	GENERAL SUPPORT	20,000
	NONE	NONE PC	NONE PC GENERAL SUPPORT

Total	 ▶ 3a	1,362,000
NASHVILLE, TN 37215		
1608 WOODMONT BLVD		

efile GRAPHIC print - DO NOT PROCES	S As Filed D	ata -		DLN: 93491306006451				
TY 2020 Accounting Fees So	TY 2020 Accounting Fees Schedule							
Nam	e: NISSAN	FOUNDATION						
EI	N: 95-4413	799						
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes				
ACCOUNTING FEES	10,046	5,023		5,023				

efile GRAPHIC print - DO NOT PROCESS | As Filed Data -DLN: 93491306006451 Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing. TY 2020 Depreciation Schedule Name: NISSAN FOUNDATION

EIN: 95-4413799

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	D	LN: 93491306006451
TY 2020 Investments Corpora	te Bonds Schedule		
Name:	NISSAN FOUNDATION		
EIN:	95-4413799		
Investments Corporate Bonds Schedule			
Name of Bond	I	End of Year Book	End of Year Fair

MFO BLACKROCK FDS HIGH YIELD B

Value

2,005,560

Market Value

2,005,560

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491306006451
TY 2020 Investments Corporat	dule	
Name: 1	NISSAN FOUNDAT	TION

1,358,091

1,358,091

Name of Stoc	k	End of Year Book	End of Year Fair
Investments Corporation Stock Schedule			
EIN:	95-4413799		
Hamer	NISS/NI I COND/NI ION		

Investments Corporation Stock Schedule		
Name of Stock	End of Year Book Value	End of Year Fair Market Value
MFO ADVISORS INNER CIRCLE FD L	1,294,294	1,294,294

MFO DEUTSCHE REAL ESTATE SEC

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491306006451
TY 2020 Investments Governments	ment Obligations Schedule	
Name:	NISSAN FOUNDATION	
EIN:	95-4413799	
US Government Securities - End of Year Book Value:	8,015,650	
US Government Securities - End of Year Fair Market Value:	8,015,650	
State & Local Government Securities - End of Year Book Value:		
State & Local Government Securities - End of Year Fair Market Value:		

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491306006451
TY 2020 Other Decreases Scho	edule	
Name:	NISSAN FOUNDATION	
EIN:	95-4413799	
De	escription	Amount
ADJUSTMENT FOR ACCRUED INCOME		2,965

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	Data - DLN: 93491306006451			
TY 2020 Other Expenses Schedule					
Name:	NISSAN FOUND	PATION			
EIN:	95-4413799				
Other Expenses Schedule					
Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes	
BANK FEES	483			483	

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Name: NISSAN FOUNDATION

EIN: 95-4413799

OTHER INCOME

ner Income Schedule		
Description	Revenue And	Net Inv

vestment Income

2,783

Adjusted Net Income

DLN: 93491306006451

2,783

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -		DLN: 93491306006451
TY 2020 Other Increases Sche	edule		
Name:	NISSAN FOUND	PATION	
EIN: 95-4413799			
Other Increases Schedule			
De	escription		Amount
UNREALIZED GAIN ON INVESTMENTS			1,006,381

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491306006451				
TY 2020 Other Professional Fees Schedule						
Name: NISSAN FOUNDATION EIN: 95-4413799						
Category Amount Net Investment Income Income Disbursements for Charitable Purposes						

20,056

20,056

MANAGEMENT FEES

efile GRAPHIC print - DO NOT PROCESS	As Filed Data	-	DL	N: 93491306006451
TY 2020 Taxes Schedule				
Name:	NISSAN FOU	JNDATION		
EIN:	95-4413799	i		
Taxes Schedule			,	
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX ON NET INVEST. INC.	14,434		1	
STATE FILING FEES	85		1	85