# \*\* PUBLIC DISCLOSURE COPY \*\*

Form **990** 

# Return of Organization Exempt From Income Tax Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Department of the Treasury Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public. ► Go to www.irs.gov/Form990 for instructions and the latest information.

| OMB No. 1545-0047            |
|------------------------------|
| <b>2020</b>                  |
| Open to Public<br>Inspection |

| Α                                   | ror the             | e 2020 calendar year, or tax year beginning   | and                    | enaing        |                                     |                                  |  |  |  |  |  |
|-------------------------------------|---------------------|---|------------------------|---------------|-------------------------------------|----------------------------------|--|--|--|--|--|
| В                                   | Check if applicable | C Name of organization  |                        |               | D Employer identific                | cation number                    |  |  |  |  |  |
|                                     | Addres              | THE RICHARD NIXON FOUNDATION  | ON                     |               |                                     |                                  |  |  |  |  |  |
|                                     | Name change         |   | 52-12783               | 03            |                                     |                                  |  |  |  |  |  |
|                                     | Initial<br>return   | Number and street (or P.O. box if mail is not delivered to s  | E Telephone number     | •             |                                     |                                  |  |  |  |  |  |
|                                     | Final<br>return/    |   | ,                      |               |                                     |                                  |  |  |  |  |  |
|                                     | termin<br>ated      | City or town, state or province, country, and ZIP or for  | reign postal code      |               | G Gross receipts \$                 | 18,497,429.                      |  |  |  |  |  |
|                                     | Ameno               |   |                        |               | H(a) Is this a group re             |                                  |  |  |  |  |  |
|                                     | Applic              |   |                        |               | for subordinates                    |                                  |  |  |  |  |  |
|                                     | cluded? Yes No      |   |                        |               |                                     |                                  |  |  |  |  |  |
| $\overline{\Gamma}$                 | Tax-exe             | empt status: $X = 501(c)(3)$ $= 501(c)($ ) $= 600$ (inser   | t no.) 4947(a)(1)      | or 527        | 1 ' '                               | list. See instructions           |  |  |  |  |  |
| J                                   | Websit              | te: ► NIXONFOUNDATION.ORG   |                        |               | H(c) Group exemption                | n number 🕨                       |  |  |  |  |  |
| K                                   | Form of             | organization: X Corporation Trust Association   | Other >                | <b>L</b> Year | of formation: 1983 N                | State of legal domicile: CA      |  |  |  |  |  |
|                                     |                     | Summary   |                        |               |                                     | ·                                |  |  |  |  |  |
| _                                   | 1                   | Briefly describe the organization's mission or most significar  | nt activities: SEE     | SCHEDU        | LE O, FORM                          | 990, PART                        |  |  |  |  |  |
| Activities & Governance             |                     | 1, LINE 1   |                        |               |                                     |                                  |  |  |  |  |  |
| rış                                 | 2                   | Check this box  if the organization discontinued it   | s operations or dispo  | sed of more   | than 25% of its net as              |                                  |  |  |  |  |  |
| Š                                   | 3                   | Number of voting members of the governing body (Part VI, I  | ine 1a)                |               | 3                                   | 20                               |  |  |  |  |  |
| ه<br>ص                              | 4                   | Number of independent voting members of the governing b   | ody (Part VI, line 1b) |               | 4                                   | 20                               |  |  |  |  |  |
| es                                  | 5                   | Total number of individuals employed in calendar year 2020  | (Part V, line 2a)      |               | 5                                   | 51                               |  |  |  |  |  |
| Ĭŧ                                  | 6                   | Total number of volunteers (estimate if necessary)  |                        |               | 6                                   | 170                              |  |  |  |  |  |
| Act                                 | 7 a                 | Total unrelated business revenue from Part VIII, column (C),  | line 12                |               | 7a                                  | 8,434.                           |  |  |  |  |  |
| _                                   | b                   | Net unrelated business taxable income from Form 990-T, Pa   | art I, line 11         |               | 7b                                  | 0.                               |  |  |  |  |  |
|                                     |                     |   |                        |               | Prior Year                          | Current Year                     |  |  |  |  |  |
| ē                                   |                     | Contributions and grants (Part VIII, line 1h)   |                        |               | 1,765,968.                          | 2,235,572.                       |  |  |  |  |  |
| en                                  |                     |   |                        |               | 499,880.                            | 108,720.                         |  |  |  |  |  |
| Revenue                             |                     | Investment income (Part VIII, column (A), lines 3, 4, and 7d)   |                        | 2,755,646.    | 1,918,062.                          |                                  |  |  |  |  |  |
| _                                   | 11                  | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c,   | and 11e)               |               | 1,800,467.                          | 639,455.                         |  |  |  |  |  |
|                                     |                     | Total revenue - add lines 8 through 11 (must equal Part VIII,   |                        |               | 6,821,961.                          | 4,901,809.                       |  |  |  |  |  |
|                                     |                     | Grants and similar amounts paid (Part IX, column (A), lines 1   |                        |               | 34,500.                             | 0.                               |  |  |  |  |  |
|                                     |                     | Benefits paid to or for members (Part IX, column (A), line 4)   |                        |               | 0.                                  | 0.                               |  |  |  |  |  |
| ses                                 | 15                  | Salaries, other compensation, employee benefits (Part IX, co  |                        |               | 3,499,701.                          | 2,846,544.                       |  |  |  |  |  |
| Expenses                            | 16a                 | Professional fundraising fees (Part IX, column (A), line 11e) Total fundraising expenses (Part IX, column (D), line 25) | 10E 1                  | <u> </u>      | 0.                                  | 0.                               |  |  |  |  |  |
| Ä                                   | _b                  |   |                        |               | 5,801,771.                          | 4,292,408.                       |  |  |  |  |  |
| _                                   | 17                  | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)  |                        |               | 9,335,972.                          | 7,138,952.                       |  |  |  |  |  |
|                                     |                     | Total expenses. Add lines 13-17 (must equal Part IX, column   |                        |               | -2,514,011.                         | $\frac{7,138,932.}{-2,237,143.}$ |  |  |  |  |  |
| <u>_ v</u>                          | 19                  | Revenue less expenses. Subtract line 18 from line 12  |                        |               |                                     |                                  |  |  |  |  |  |
| Net Assets or<br>Find Balances      | 200                 | Total assets (Part V. line 16)  |                        | Ве            | ginning of Current Year 59,579,340. | End of Year<br>60,142,267.       |  |  |  |  |  |
| ASSE                                | 20                  | Total assets (Part X, line 16) Total liabilities (Part X, line 26)  |                        |               | 8,959,077.                          | 8,477,813.                       |  |  |  |  |  |
| let/                                | 22                  | Net assets or fund balances. Subtract line 21 from line 20  |                        |               | 50,620,263.                         | 51,664,454.                      |  |  |  |  |  |
|                                     | art II              | Signature Block   |                        |               | 30,020,2034                         | 31,001,131.                      |  |  |  |  |  |
|                                     |                     | Ities of perjury, I declare that I have examined this return, including   | accompanying schedule  | s and statem  | ents, and to the best of my         | knowledge and belief, it is      |  |  |  |  |  |
|                                     | •                   | t, and complete. Declaration of preparer (other than officer) is based  |                        |               |                                     | , momouge and zener, me          |  |  |  |  |  |
|                                     | ,                   |   |                        |               |                                     |                                  |  |  |  |  |  |
| Sig                                 | ın                  | Signature of officer  |                        |               | Date                                |                                  |  |  |  |  |  |
| Here   HUGH HEWITT, PRESIDENT & CEO |                     |   |                        |               |                                     |                                  |  |  |  |  |  |
|                                     |                     | Type or print name and title  |                        |               |                                     |                                  |  |  |  |  |  |
|                                     |                     | Print/Type preparer's name Preparer's   | s signature            |               | Date Check                          | PTIN                             |  |  |  |  |  |
| Pai                                 | d                   | DONITA M. JOSEPH DONIT  | A M. JOSEP             | н0            | 9/16/21 if self-employed            | □ №00286656                      |  |  |  |  |  |
| Pre                                 | parer               | Firm's name WINDES, INC.  |                        |               | Firm's EIN ▶                        | 95-3001179                       |  |  |  |  |  |
| Use                                 | Only                | Firm's address P.O. BOX 87  |                        |               |                                     |                                  |  |  |  |  |  |
|                                     |                     | LONG BEACH, CA 90801-   | -0087                  |               | Phone no. (5                        | 62)435-1191                      |  |  |  |  |  |
| Ма                                  | y the IF            | RS discuss this return with the preparer shown above? See   | instructions           |               |                                     | X Yes No                         |  |  |  |  |  |
|                                     |                     | and I UA For Department Poduction Act Notice and the  |                        |               |                                     | Earm <b>990</b> (2020)           |  |  |  |  |  |

1d Other program services (Describe on Schedule O.)

Total program service expenses ► 5,593,206.

Form **990** (2020)

) (Revenue \$

# Part IV Checklist of Required Schedules

|             |  |           | Yes | No               |
|-------------|--|-----------|-----|------------------|
| 1           | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?  |           |     |                  |
|             | If "Yes," complete Schedule A  | 1         | X   |                  |
| 2           | Is the organization required to complete Schedule B, Schedule of Contributors?   | 2         | Х   |                  |
| 3           | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for  |           |     | $ _{\mathbf{x}}$ |
|             | public office? If "Yes," complete Schedule C, Part I   | 3         |     |                  |
| 4           | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect   |           |     | x                |
| _           | during the tax year? If "Yes," complete Schedule C, Part II  | 4         |     |                  |
| 5           | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or   | 5         |     | x                |
| 6           | similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III   | 3         |     | 122              |
| 6           | provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I   | 6         |     | x                |
| 7           | Did the organization receive or hold a conservation easement, including easements to preserve open space,  | -         |     |                  |
| •           | the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II   | 7         |     | х                |
| 8           | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete   | <b>-</b>  |     |                  |
| Ŭ           | Schedule D, Part III   | 8         |     | х                |
| 9           | Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for  | ١         |     |                  |
| •           | amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services?  |           |     |                  |
|             | If "Yes," complete Schedule D, Part IV   | 9         |     | Х                |
| 10          | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments   |           |     |                  |
|             | or in quasi endowments? If "Yes," complete Schedule D, Part V  | 10        | Х   |                  |
| 11          | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X   |           |     |                  |
|             | as applicable.   |           |     |                  |
| а           | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,  |           |     |                  |
|             | Part VI  | 11a       | Х   |                  |
| b           | Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total   |           |     |                  |
|             | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII  | 11b       | Х   |                  |
| С           | Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total  |           |     |                  |
|             | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII   | 11c       |     | X                |
| d           | Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in  |           |     |                  |
|             | Part X, line 16? If "Yes," complete Schedule D, Part IX  | 11d       |     | X                |
| е           | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X  | 11e       |     | Х                |
| f           | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses  |           | 37  |                  |
|             | the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X   | 11f       | X   |                  |
| 12a         | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete  | ا مد ا    | Х   |                  |
|             | Schedule D, Parts XI and XII   | 12a       | Λ   |                  |
| D           | Was the organization included in consolidated, independent audited financial statements for the tax year?  If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional | 40h       |     | v                |
| 12          | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E  | 12b<br>13 |     | X                |
| 13<br>14a   | Did the organization maintain an office, employees, or agents outside of the United States?  | 14a       |     | X                |
| b           | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,  | 174       |     |                  |
|             | investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000   |           |     |                  |
|             | or more? If "Yes," complete Schedule F, Parts I and IV   | 14b       |     | х                |
| 15          | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any  |           |     |                  |
|             | foreign organization? If "Yes," complete Schedule F, Parts II and IV   | 15        |     | Х                |
| 16          | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to   |           |     |                  |
|             | or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV  | 16        |     | Х                |
| 17          | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,  |           |     |                  |
|             | column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I   | 17        |     | Х                |
| 18          | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines   |           |     |                  |
|             | 1c and 8a? If "Yes," complete Schedule G, Part II  | 18        |     | X                |
| 19          | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"   |           |     |                  |
|             | complete Schedule G, Part III  | 19        |     | X                |
| <b>20</b> a | Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H  | 20a       |     | Х                |
|             | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?   | 20b       |     |                  |
| 21          | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or  |           |     | , v              |
|             | domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II  | 21        |     | X                |

|         |  | - |
|---------|--|---|
| Part IV | Checklist of Required Schedules (continued | 1 |

|      |   |          | Yes | No              |
|------|---|----------|-----|-----------------|
| 22   | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on   |          |     |                 |
|      | Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III   | 22       |     | X               |
| 23   | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current  |          |     |                 |
|      | and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete  | 23       | х   |                 |
| 24a  | Schedule J  Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the   |          |     |                 |
|      | last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete  |          |     |                 |
|      | Schedule K. If "No," go to line 25a   | 24a      |     | X               |
| b    | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?   | 24b      |     |                 |
| С    | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease  |          |     |                 |
|      | any tax-exempt bonds?   | 24c      |     |                 |
|      | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?   | 24d      |     |                 |
| zoa  | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I                    | 25a      |     | x               |
| b    | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and  | 23a      |     |                 |
|      | that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete   |          |     |                 |
|      | Schedule L, Part I  | 25b      |     | Х               |
| 26   | Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current   |          |     |                 |
|      | or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%   |          |     |                 |
|      | controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II  | 26       |     | X               |
| 27   | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee,   |          |     |                 |
|      | creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled   |          |     | ٠,,             |
|      | entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III  | 27       |     | X               |
| 28   | Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV   |          |     |                 |
| _    | instructions, for applicable filing thresholds, conditions, and exceptions):  A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If</i>                         |          |     |                 |
| а    | "Yes," complete Schedule L, Part IV   | 28a      |     | x               |
| b    | A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV   | 28b      |     | X               |
|      | A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b?If  |          |     |                 |
|      | "Yes," complete Schedule L, Part IV   | 28c      |     | X               |
| 29   | Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M  | 29       | Х   |                 |
| 30   | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation   |          |     | l               |
|      | contributions? If "Yes," complete Schedule M  | 30       |     | X               |
| 31   | Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I  | 31       |     | Х               |
| 32   | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete  | 00       |     | x               |
| 22   | Schedule N, Part II  Did the organization own 100% of an entity disregarded as separate from the organization under Regulations   | 32       |     |                 |
| 33   | sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I   | 33       |     | x               |
| 34   | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and   | -00      |     |                 |
|      | Part V, line 1  | 34       |     | Х               |
| 35 a | Did the organization have a controlled entity within the meaning of section 512(b)(13)?   | 35a      |     | Х               |
|      | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity   |          |     |                 |
|      | within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2   | 35b      |     |                 |
| 36   | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?  |          |     | \ <sub>32</sub> |
|      | If "Yes," complete Schedule R, Part V, line 2   | 36       |     | X               |
| 37   | Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI | 37       |     | x               |
| 38   | Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?  | 31       |     | - 21            |
| 30   |   | 38       | х   |                 |
| Pai  | Note: All Form 990 filers are required to complete Schedule O rt V Statements Regarding Other IRS Filings and Tax Compliance  | <u>,</u> |     |                 |
|      | Check if Schedule O contains a response or note to any line in this Part V  | <u></u>  |     |                 |
|      |   |          | Yes | No              |
| 1a   | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable 1a 65  | -        |     |                 |
| b    |   |          |     |                 |
| С    | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming  | _        | v   |                 |
|      | (gambling) winnings to prize winners?   | 1c       | X   |                 |

032004 12-23-20

# Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

|           |  |                     | _                 |            | Yes | No   |
|-----------|--|---------------------|-------------------|------------|-----|--|
| 2a        | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,  |                     |                   |            |     |  |
|           | filed for the calendar year ending with or within the year covered by this return  | 2a                  | 51                |            |     |  |
| b         | If at least one is reported on line 2a, did the organization file all required federal employment tax returns  | ns?                 |                   | <b>2</b> b | Х   |  |
|           | Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions   | s)                  |                   |            |     |  |
| За        | Did the organization have unrelated business gross income of \$1,000 or more during the year?  |                     |                   | 3a         | Х   |  |
| b         | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule  |                     |                   | 3b         | X   |  |
| 4a        | At any time during the calendar year, did the organization have an interest in, or a signature or other  |                     |                   |            |     |  |
|           | financial account in a foreign country (such as a bank account, securities account, or other financial   | account)?           |                   | 4a         |     | Х  |
| b         | If "Yes," enter the name of the foreign country  |                     |                   |            |     |  |
| _         | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial A   |                     | ı                 | _          |     | v  |
| 5a        | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  |                     |                   | 5a         |     | X  |
| b         | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transa   |                     |                   | 5b         |     |  |
| C         | If "Yes" to line 5a or 5b, did the organization file Form 8886-T?  |                     |                   | 5c         |     |  |
| 6a        | any contributions that were not tax deductible as charitable contributions?  |                     |                   | 6a         |     | x  |
| h         | If "Yes," did the organization include with every solicitation an express statement that such contribut  |                     |                   | - Ua       |     |  |
|           | were not tax deductible?   |                     |                   | 6b         |     |  |
| 7         | Organizations that may receive deductible contributions under section 170(c).  |                     |                   | 0.0        |     |  |
| а         | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and ser  | vices provided to t | the payor?        | 7a         | Х   |  |
| b         | If "Yes," did the organization notify the donor of the value of the goods or services provided?  | -                   |                   | 7b         | Х   |  |
| С         | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was   |                     |                   |            |     |  |
|           | to file Form 8282?   |                     |                   | 7c         |     | X  |
| d         | If "Yes," indicate the number of Forms 8282 filed during the year  | 7d                  |                   |            |     |  |
| е         | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit of   | ontract?            |                   | 7e         |     | X  |
| f         | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit control   | act?                |                   | 7f         |     | Х  |
| g         | If the organization received a contribution of qualified intellectual property, did the organization file Fo   | orm 8899 as requ    | uired?            | 7g         | N/  |  |
| h         | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization   |                     | 1098-C?           | 7h         | N/  | A  |
| 8         | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained  |                     | NT / 7            |            |     |  |
| _         | sponsoring organization have excess business holdings at any time during the year?   |                     | N/A               | 8          |     |  |
| 9         | Sponsoring organizations maintaining donor advised funds.  |                     | N/A               | 0-         |     |  |
| a         | Did the sponsoring organization make any taxable distributions under section 4966?   |                     | N/A               | 9a<br>9b   |     |  |
| 10        | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? Section 501(c)(7) organizations. Enter:  |                     | <del>***/**</del> | 90         |     |  |
| а         | Initiation fees and capital contributions included on Part VIII, line 12 N/A   | 10a                 |                   |            |     |  |
| b         | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  | 10b                 |                   |            |     |  |
| 11        | Section 501(c)(12) organizations. Enter:   |                     |                   |            |     |  |
| а         | Gross income from members or shareholders N/A  | 11a                 |                   |            |     |  |
| b         | Gross income from other sources (Do not net amounts due or paid to other sources against   |                     |                   |            |     |  |
|           | amounts due or received from them.)  | 11b                 |                   |            |     |  |
|           | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form   | 1041?               |                   | 12a        |     |  |
| b         | If "Yes," enter the amount of tax-exempt interest received or accrued during the year  | 12b                 |                   |            |     |  |
| 13        | Section 501(c)(29) qualified nonprofit health insurance issuers.   |                     |                   |            |     |  |
| а         | Is the organization licensed to issue qualified health plans in more than one state?   |                     | N/A               | 13a        |     |  |
| _         | <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.   |                     |                   |            |     |  |
| b         | Enter the amount of reserves the organization is required to maintain by the states in which the   | 405                 |                   |            |     |  |
| _         | organization is licensed to issue qualified health plans   | 13b                 |                   |            |     |  |
| C<br>1/12 | Enter the amount of reserves on hand  Did the organization receive any payments for indoor tanning services during the tax year?   | 13c                 |                   | 140        |     | X  |
| 14a       |  |                     |                   | 14a<br>14b |     |  |
| 15        | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedu Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remune |                     |                   | 140        |     | <del>                                     </del> |
| .5        | excess parachute payment(s) during the year?   |                     |                   | 15         |     | x  |
|           | If "Yes," see instructions and file Form 4720, Schedule N.   |                     |                   | .5         |     |  |
| 16        | Is the organization an educational institution subject to the section 4968 excise tax on net investment  | t income?           |                   | 16         |     | х  |
| -         | If "Yes," complete Form 4720, Schedule O.  |                     |                   |            |     |  |
|           | ,  |                     |                   | Form       | 990 | (2020)   |

v

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

|            | Check if Schedule O contains a response or note to any line in this Part VI  |                          |                 |         |         | Λ    |
|------------|--|--------------------------|-----------------|---------|---------|------|
| Sec        | tion A. Governing Body and Management  |                          |                 |         |         |      |
|            |  | 1 1                      | ۰.۰             |         | Yes     | No   |
| 1a         | Enter the number of voting members of the governing body at the end of the tax year  | 1a                       | 20              |         |         |      |
|            | If there are material differences in voting rights among members of the governing body, or if the governing  |                          |                 |         |         |      |
|            | body delegated broad authority to an executive committee or similar committee, explain on Schedule O.  |                          |                 |         |         |      |
| b          | Enter the number of voting members included on line 1a, above, who are independent   | 1b                       | 20              |         |         |      |
| 2          | Did any officer, director, trustee, or key employee have a family relationship or a business relationsh  | p with any other         |                 |         |         |      |
|            | officer, director, trustee, or key employee?   |                          | L               | 2       | Х       |      |
| 3          | Did the organization delegate control over management duties customarily performed by or under the   | ne direct supervision    |                 |         |         |      |
|            | of officers, directors, trustees, or key employees to a management company or other person?  |                          | L               | 3       |         | X    |
| 4          | Did the organization make any significant changes to its governing documents since the prior Form  | 990 was filed?           |                 | 4       |         | Х    |
| 5          | Did the organization become aware during the year of a significant diversion of the organization's as  | sets?                    | Г               | 5       |         | X    |
| 6          | Did the organization have members or stockholders?   |                          | Г               | 6       | X       |      |
| 7a         | Did the organization have members, stockholders, or other persons who had the power to elect or a  |                          |                 |         |         |      |
|            | more members of the governing body?  |                          |                 | 7a      | X       |      |
| b          | Are any governance decisions of the organization reserved to (or subject to approval by) members,  |                          | Ш Г             |         |         |      |
|            | persons other than the governing body?   |                          |                 | 7b      |         | Х    |
| 8          | Did the organization contemporaneously document the meetings held or written actions undertaken during the ye  |                          | ····            |         |         |      |
| а          | The governing body?  | -                        |                 | 8a      | Х       |      |
| b          | Each committee with authority to act on behalf of the governing body?  |                          | - 1             | 8b      | Х       |      |
| 9          | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be rea  |                          | ····            |         |         |      |
| -          | organization's mailing address? If "Yes," provide the names and addresses on Schedule O  |                          |                 | 9       |         | Х    |
| Sec        | tion B. Policies (This Section B requests information about policies not required by the Internal Fi   |                          |                 |         |         |      |
|            |  |                          |                 |         | Yes     | No   |
| 10a        | Did the organization have local chapters, branches, or affiliates?   |                          | Г               | 10a     |         | X    |
|            | If "Yes," did the organization have written policies and procedures governing the activities of such control of the control of |                          | ····            |         |         |      |
| -          | and branches to ensure their operations are consistent with the organization's exempt purposes?  |                          |                 | 10b     |         |      |
| 11a        | Has the organization provided a complete copy of this Form 990 to all members of its governing boo   |                          |                 | 11a     | Х       |      |
| b          | Describe in Schedule O the process, if any, used by the organization to review this Form 990.  | ly belote iming the form | ··              |         |         |      |
| 12a        | Did the organization have a written conflict of interest policy? If "No," go to line 13  |                          |                 | 12a     | Х       |      |
| b          | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise  |                          |                 | 12b     | Х       |      |
|            | Did the organization regularly and consistently monitor and enforce compliance with the policy? If ")  |                          | ···· ├          |         |         |      |
| Ū          | in Schedule O how this was done  |                          |                 | 12c     | Х       |      |
| 13         | Did the organization have a written whistleblower policy?  |                          | ···· ⊦          | 13      | Х       |      |
| 14         | Did the organization have a written document retention and destruction policy?   |                          |                 | 14      | Х       |      |
| <br>15     | Did the process for determining compensation of the following persons include a review and approv  |                          | ····            |         |         |      |
|            | persons, comparability data, and contemporaneous substantiation of the deliberation and decision?  | •                        |                 |         |         |      |
| •          | The organization's CEO, Executive Director, or top management official   |                          |                 | 15a     | Х       |      |
|            | Other officers or key employees of the organization  |                          |                 | 15b     | X       |      |
| D          | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).  |                          | ⊦               | .55     |         |      |
| 162        | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrange   | ment with a              |                 |         |         |      |
| ·va        | taxable entity during the year?  |                          |                 | 16a     |         | Х    |
| h          | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate   |                          | ├               | ioa     |         |      |
| J          | in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization to evaluation to ev |                          |                 |         |         |      |
|            |  |                          |                 | 16b     |         |      |
| Sec        | exempt status with respect to such arrangements?tion C. Disclosure   |                          |                 | .55     |         |      |
| <u> 17</u> | List the states with which a copy of this Form 990 is required to be filed ▶CA   |                          |                 |         |         |      |
| <br>18     | Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, a   | and 990-T (Section 501   | (c)(3)s         | s only  | ) avail | able |
|            | for public inspection. Indicate how you made these available. Check all that apply.  | / (2550011 001           | (-/( <b>-</b> / | y       | , 👊     |      |
|            |  | on Schedule O)           |                 |         |         |      |
| 19         | Describe on Schedule O whether (and if so, how) the organization made its governing documents, c   |                          | /. and          | l finar | ncial   |      |
|            | statements available to the public during the tax year.  | sor or antoroor policy   | , , a i i       |         | . 5.01  |      |
| 20         | State the name, address, and telephone number of the person who possesses the organization's bo  | ooks and records         |                 |         |         |      |
|            | MAMTA DALAL - 714-993-5075   |                          |                 |         |         |      |
|            | 18001 YORBA LINDA BLVD, YORBA LINDA, CA 92886-394  | .9                       |                 |         |         |      |
|            | ,  |                          |                 |         |         |      |

032006 12-23-20

# Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

#### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

oxdet Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

See instructions for the order in which to list the persons above.

| (A)<br>Name and title                         | (B) Average hours per                                      | box                            | not c<br>, unle       | ss pe   | ition<br>more<br>rson | than<br>is bot                  | h an     | ( <b>D</b> ) Reportable compensation           | (E) Reportable compensation                      | (F) Estimated amount of   |
|---|--|--------------------------------|-----------------------|---------|-----------------------|---------------------------------|----------|--|--|---|
|   | week (list any hours for related organizations below line) | Individual trustee or director | Institutional trustee | Officer | Key employee          | Highest compensated<br>employee | Former   | from<br>the<br>organization<br>(W-2/1099-MISC) | from related<br>organizations<br>(W-2/1099-MISC) | other<br>compensation<br>from the<br>organization<br>and related<br>organizations |
| (1) IRENE L KLEPP<br>CFO (UNTIL 07/15/2020)   | 40.00  |                                |                       | Х       |                       |                                 |          | 182,742.                                       | 0.   | 23,417.   |
| (2) HUGH HEWITT                               | 40.00  |                                |                       | 1       |                       |                                 |          | 102,742.                                       | 0.   | 23,417.   |
| PRESIDENT & CEO                               | 40.00  | х                              |                       | х       |                       |                                 |          | 145,271.                                       | 0.   | 22,678.   |
| (3) JAMES T. BYRON                            | 40.00  |                                |                       |         |                       |                                 |          | 113/2/11                                       |  | 2270700   |
| EXECUTIVE VICE PRESIDENT                      | 1000   |                                |                       | x       |                       |                                 |          | 147,498.                                       | 0.   | 14,669.   |
| (4) CARRIE L MAURATH                          | 40.00  |                                |                       |         |                       |                                 |          |  |  |   |
| VP OF SALES                                   |  |                                |                       | x       |                       |                                 |          | 117,225.                                       | 0.   | 16,350.   |
| (5) CHRIS NORDYKE                             | 40.00  |                                |                       |         |                       |                                 |          | , -  |  |   |
| VP OF EXTERNAL AFFAIRS                        |  |                                |                       | х       |                       |                                 |          | 111,766.                                       | 0.   | 10,808.   |
| (6) JANINE EGGERS                             | 40.00  |                                |                       |         |                       |                                 |          | -  |  | -   |
| SECRETARY                                     |  |                                |                       | х       |                       |                                 |          | 56,300.  | 0.   | 22,927.   |
| (7) HON. JAMES CAVANAUGH                      | 5.00   |                                |                       |         |                       |                                 |          |  |  |   |
| CHAIRMAN AND DIRECTOR                         |  | Х                              |                       | Х       |                       |                                 |          | 0.   | 0.   | 0.  |
| (8) JOHN H. BARR                              | 5.00   |                                |                       |         |                       |                                 |          |  |  |   |
| TREASURER AND DIRECTOR                        |  | Х                              |                       | Х       |                       |                                 |          | 0.   | 0.   | 0.  |
| (9) HON. EVERETT ALVAREZ, JR.                 | 2.00   |                                |                       |         |                       |                                 |          |  |  |   |
| BOARD MEMBER                                  |  | Х                              |                       |         |                       |                                 |          | 0.   | 0.   | 0.  |
| (10) LISA ARGYROS                             | 1.00   |                                |                       |         |                       |                                 |          |  |  |   |
| BOARD MEMBER                                  |  | Х                              |                       |         |                       |                                 |          | 0.   | 0.   | 0.  |
| (11) HON. ROBERT J. BROWN                     | 1.00   |                                |                       |         |                       |                                 |          | _  | _  | _   |
| BOARD MEMBER                                  |  | Х                              |                       |         |                       |                                 |          | 0.   | 0.   | 0.  |
| (12) JOHN H. CARLEY                           | 1.00   |                                |                       |         |                       |                                 |          |  | _  | _   |
| BOARD MEMBER                                  |  | Х                              |                       |         |                       |                                 |          | 0.   | 0.   | 0.  |
| (13) CHRISTOPHER NIXON COX                    | 1.00   |                                |                       |         |                       |                                 |          |  |  |   |
| BOARD MEMBER                                  | 1 00   | Х                              |                       |         |                       |                                 |          | 0.   | 0.   | 0.  |
| (14) TRICIA NIXON COX                         | 1.00   |                                |                       |         |                       |                                 |          |  |  | ^   |
| BOARD MEMBER                                  | 1 00   | Х                              |                       |         |                       |                                 |          | 0.   | 0.   | 0.  |
| (15) JULIE NIXON EISENHOWER                   | 1.00   | ٠,                             |                       |         |                       |                                 |          |  |  | •   |
| BOARD MEMBER                                  | 1 00   | Х                              |                       |         |                       | _                               | _        | 0.   | 0.   | 0.  |
| (16) MELANIE EISENHOWER                       | 1.00   | - V                            |                       |         |                       |                                 |          | ^  | ^  | 0   |
| BOARD MEMBER                                  | 1.00   | Х                              | $\vdash$              |         | <u> </u>              | $\vdash$                        | $\vdash$ | 0.   | 0.   | 0.  |
| (17) BARBARA HACKMAN FRANKLIN<br>BOARD MEMBER | 1.00   | Х                              |                       |         |                       |                                 |          | 0.   | 0.   | 0.  |
| 032007 12-23-20                               |  | Δ                              |                       |         |                       |                                 |          | 1 0.   | 0.   | Form <b>990</b> (2020)  |

| Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued) |  |                                |                       |         |              |                              |        |  |  |  |  |
|---|--|--------------------------------|-----------------------|---------|--------------|------------------------------|--------|--|--|--|--|
| (A)   | (B)  |                                |                       | ((      | <del>)</del> |                              |        | (D)                                    | (E)  | (F)  |  |
| Name and title  | Average<br>hours per<br>week   | box                            | not c                 | ss pe   | more<br>rson | than<br>is bot<br>or/trus    | h an   | Reportable<br>compensation<br>from     | Reportable<br>compensation<br>from related | Estimated<br>amount of<br>other  |  |
|   | (list any<br>hours for<br>related<br>organizations<br>below<br>line) | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | the<br>organization<br>(W-2/1099-MISC) | organizations<br>(W-2/1099-MISC)           | compensation<br>from the<br>organization<br>and related<br>organizations |  |
| (18) JOHN W. HAMILTON   | 1.00   |                                |                       |         |              |                              |        |  |  |  |  |
| BOARD MEMBER  |  | Х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (19) HON. LAWRENCE M. HIGBY<br>BOARD MEMBER   | 1.00   | Х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (20) MING HSIEH   | 1.00   |                                |                       |         |              |                              |        |  |  |  |  |
| BOARD MEMBER  |  | Х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (21) TOD HULLIN   | 1.00   |                                |                       |         |              |                              |        |  |  |  |  |
| BOARD MEMBER  |  | Х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (22) MAUREEN DROWN NUNN<br>BOARD MEMBER   | 1.00   | х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (23) SANDY QUINN  | 1.00   |                                |                       |         |              |                              |        |  |  |  |  |
| BOARD MEMBER  |  | X                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (24) J. PETER SIMON   | 2.00   |                                |                       |         |              |                              |        |  |  |  |  |
| BOARD MEMBER  |  | Х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (25) DANIELE STRUPPA  | 1.00   |                                |                       |         |              |                              |        |  |  |  |  |
| BOARD MEMBER  |  | Х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| (26) RONALD H. WALKER   | 1.00   |                                |                       |         |              |                              |        | _                                      | _  | _  |  |
| BOARD MEMBER  |  | Х                              |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| 1b Subtotal   |  |                                |                       |         |              |                              |        | 760,802.                               | 0.   | 110,849.   |  |
| c Total from continuation sheets to Part V  |  |                                |                       |         |              |                              |        | 0.                                     | 0.   | 0.   |  |
| d Total (add lines 1b and 1c)   |  |                                |                       |         |              |                              |        | 760,802.                               | 0.   | 110,849.   |  |

Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization

Yes No 3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual 3 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual Х 4 5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services X rendered to the organization? If "Yes," complete Schedule J for such person

#### **Section B. Independent Contractors**

Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A) Name and business address   | (B) Description of services | (C)<br>Compensation |
|---|-----------------------------|---------------------|
| RALPH HUDSON  |                             |                     |
| 1514 FLOWER STEET, GLENDALE, CA 91201   | EXHIBIT FABRICATION         | 301,186.            |
| PAPATIME  |                             |                     |
| 5700 WILSHIRE BLVD, LOS ANGELES, CA 90036   | BOOK PROJECT                | 210,000.            |
| JAVELIN GROUP, 203 SOUTH UNION STREET,  | COMMUNICATION & PART        |                     |
| ALEXANDRIA , VA 22314   | OF BOOK PROJECT             | 121,000.            |
| KTGY  |                             |                     |
| 17911 VON KARMAN , IRVINE, CA 92614   | PROPERTY EXTENSION          | 108,947.            |
| RONALD PEKAR  | ARTIST FOR                  |                     |
| 1426 HIGHLAND AVE, GLENDALE, CA 91202   | SCULPTURES                  | 106,000.            |
| 2 Total number of independent contractors (including but not limited to those liste |                             |                     |
| \$100,000 of compensation from the organization > 5                                 |                             |                     |

SEE PART VII, SECTION A CONTINUATION SHEETS

|  | ענ   | FOUNDATION 52-127830                |                       |         |              |                              |        |  |  |   |  |
|--|--|-------------------------------------|-----------------------|---------|--------------|------------------------------|--------|--|--|---|--|
| Part VII Section A. Officers, Directors, Tru | istees, Key Ei   | nplo                                | yee                   | s, a    | nd F         | ligh                         | est    | Compensated Employ                             | ees (continued)                                  |   |  |
| (A)<br>Name and title                        | (B)<br>Average<br>hours  | (C) Position (check all that apply) |                       |         |              |                              | ly)    | <b>(D)</b> Reportable compensation             | <b>(E)</b><br>Reportable<br>compensation         | <b>(F)</b> Estimated amount of  |  |
|  | per week (list any hours for related organizations below line) | Individual trustee or director      | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | from<br>the<br>organization<br>(W-2/1099-MISC) | from related<br>organizations<br>(W-2/1099-MISC) | other<br>compensation<br>from the<br>organization<br>and related<br>organizations |  |
| (27) GOV. PETE WILSON                        | 1.00   | ₹,                                  |                       |         |              |                              |        | 0  | 0  | 0   |  |
| BOARD MEMBER                                 |  | X                                   |                       |         |              |                              |        | 0.   | 0.   | 0   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |
|  |  |                                     |                       |         |              |                              |        |  |  |   |  |

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|  |     | Check if Schedule O   | contains a resnonse                    | or note to any lin                    | e in this Part VIII |                   |                  |                    |
|--|-----|---|--|---------------------------------------|---------------------|-------------------|------------------|--------------------|
|  |     | Officer if Schedule O   | contains a response                    | or note to arry iii                   | (A)                 | (B)               | (C)              | (D)                |
|  |     |   |  |                                       | Total revenue       | Related or exempt |                  | Revenuè éxcluded   |
|  |     |   |  |                                       |                     | function revenue  | business revenue | from tax under     |
| (0.40  |     |   |  |                                       |                     |                   |                  | sections 512 - 514 |
| nts  |     | a Federated campaigns   |  |                                       |                     |                   |                  |                    |
| Gra  | ı   | <b>b</b> Membership dues  | 1b                                     | 369,944.                              |                     |                   |                  |                    |
| ts,<br>An  |     | c Fundraising events  | 1c                                     |                                       |                     |                   |                  |                    |
| Gif<br>Iar   |     | d Related organizations   | 1d                                     |                                       |                     |                   |                  |                    |
| imi  |     | e Government grants (contr  | ributions) 1e                          | 600,000.                              |                     |                   |                  |                    |
| Contributions, Gifts, Grants and Other Similar Amounts | 1   | f All other contributions, gifts,   | grants, and                            |                                       |                     |                   |                  |                    |
| bu   |     | similar amounts not included  | above 1f                               | 1,265,628.                            |                     |                   |                  |                    |
| nt<br>d O  |     | g Noncash contributions included in   | lines 1a-1f 1g \$                      | 214,181.                              |                     |                   |                  |                    |
| Co   |     | h Total. Add lines 1a-1f  |  | <b>&gt;</b>                           | 2,235,572.          |                   |                  |                    |
|  |     |   |  | Business Code                         |                     |                   |                  |                    |
| ø  | 2 : | a ADMISSION REVENUE   |  | 713110                                | 108,720.            | 108,720.          |                  |                    |
| vic  |     | b   |  |                                       | , -                 | , -               |                  |                    |
| Ser  |     | c   | _                                      |                                       |                     |                   |                  |                    |
| E Š  |     | d   |  |                                       |                     |                   |                  |                    |
| Re   |     |   |  |                                       |                     |                   |                  |                    |
| Program Service<br>Revenue                             |     | • All other presume condice   | ************************************** |                                       |                     |                   |                  |                    |
| _  |     | f All other program service   |  |                                       | 108,720.            |                   |                  |                    |
| _  | 3   | g Total. Add lines 2a-2f Investment income (include                           |  |                                       | 100,720.            |                   |                  |                    |
|  | 3   |   | -                                      |                                       | 696,062.            |                   |                  | 696,062.           |
|  | 4   | other similar amounts)  |  |                                       | 030,002.            |                   |                  | 030,002.           |
|  | 4   | Income from investment of   |  | t t                                   |                     |                   |                  |                    |
|  | 5   | Royalties   | (i) Real                               | (ii) Personal                         |                     |                   |                  |                    |
|  | _   |   | I                                      | (II) Fersorial                        |                     |                   |                  |                    |
|  |     | a Gross rents   | 6a 656,587.                            |                                       |                     |                   |                  |                    |
|  |     | <b>b</b> Less: rental expenses  | 6b 102,637.                            |                                       |                     |                   |                  |                    |
|  |     | c Rental income or (loss)   | 6c 553,950.                            |                                       | FF2 0F0             |                   |                  | EE2 0E0            |
|  |     | d Net rental income or (loss)   | (i) Securities                         |                                       | 553,950.            |                   |                  | 553,950.           |
|  | 7   | a Gross amount from sales of  | .,                                     | (ii) Other                            |                     |                   |                  |                    |
|  |     | assets other than inventory   | 7a 14,621,029.                         |                                       |                     |                   |                  |                    |
| ø  |     | b Less: cost or other basis   | 12 200 020                             |                                       |                     |                   |                  |                    |
| nue  |     | and sales expenses  | <b>7b</b> 13,399,029.                  |                                       |                     |                   |                  |                    |
| Revenue  | (   | c Gain or (loss)  | /c 1,222,000.                          |                                       | 1 222 000           |                   |                  | 1 222 000          |
|  |     | d Net gain or (loss)  |  |                                       | 1,222,000.          |                   |                  | 1,222,000.         |
| Other  | 8   | a Gross income from fundraising   | `                                      |                                       |                     |                   |                  |                    |
| 0  |     | including \$  | of Oct                                 |                                       |                     |                   |                  |                    |
|  |     | contributions reported on   |  |                                       |                     |                   |                  |                    |
|  |     | Part IV, line 18  |  |                                       |                     |                   |                  |                    |
|  |     | b Less: direct expenses   |  |                                       |                     |                   |                  |                    |
|  |     | c Net income or (loss) from   | · -                                    |                                       |                     |                   |                  |                    |
|  | 9   | a Gross income from gamin   | -                                      |                                       |                     |                   |                  |                    |
|  |     | Part IV, line 19  |  |                                       |                     |                   |                  |                    |
|  |     | <ul><li>b Less: direct expenses</li><li>c Net income or (loss) from</li></ul> |  |                                       |                     |                   |                  |                    |
|  |     | a Gross sales of inventory, I   |  | <b>P</b>                              |                     |                   |                  |                    |
|  | 10  | • ,   |  | 178,294.                              |                     |                   |                  |                    |
|  |     | and allowances  |  | <del></del>                           |                     |                   |                  |                    |
|  |     | b Less: cost of goods sold  |  | · · · · · · · · · · · · · · · · · · · | 84,340.             | 75,906.           | 8,434.           |                    |
|  | •   | c Net income or (loss) from   | sales of inventory                     |                                       | 04,340.             | 75,300.           | 0,434.           |                    |
| sno  | 44  | a OTHER INCOME  |  | Business Code<br>900099               | 1,165.              | 1,165.            |                  |                    |
| neo  |     |   |  | 300033                                | 1,103.              | 1,105.            |                  |                    |
| Miscellaneous<br>Revenue                               |     | b   |  |                                       |                     |                   |                  |                    |
| Re   |     | d All other revenue   |  |                                       |                     |                   |                  |                    |
| Σ  |     | d All other revenue   |  |                                       | 1,165.              |                   |                  |                    |
|  | 12  | e Total. Add lines 11a-11d  Total revenue. See instructio                     |  | ·····                                 | 4,901,809.          | 185,791.          | 8,434.           | 2,472,012.         |
|  | 12  | TOTAL TOVETIME. DEE HISH UCHO   | лю                                     |                                       | 1,501,009.          | 100,701.          | L 0,434.         | 2, 4,2,012.        |

032009 12-23-20

# Part IX | Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

| Dο     | Check if Schedule O contains a respon not include amounts reported on lines 6b,                   | (A)                                   | (B)                         | (C)                             | (D)                  |
|--------|---|---------------------------------------|-----------------------------|---------------------------------|----------------------|
|        | 8b, 9b, and 10b of Part VIII.   | Total expenses                        | Program service<br>expenses | Management and general expenses | Fundraising expenses |
| 1      | Grants and other assistance to domestic organizations   |                                       |                             |                                 |                      |
| _      | and domestic governments. See Part IV, line 21  |                                       |                             |                                 |                      |
| 2      | Grants and other assistance to domestic   |                                       |                             |                                 |                      |
| _      | individuals. See Part IV, line 22   |                                       |                             |                                 |                      |
| 3      | Grants and other assistance to foreign  |                                       |                             |                                 |                      |
|        | organizations, foreign governments, and foreign   |                                       |                             |                                 |                      |
|        | individuals. See Part IV, lines 15 and 16   |                                       |                             |                                 |                      |
| 4      | Benefits paid to or for members   |                                       |                             |                                 |                      |
| 5      | Compensation of current officers, directors,  | 871,649.                              | 599,595.                    | 167,976.                        | 104,078              |
| _      | trustees, and key employees   | 0/1,049.                              | 399,393.                    | 101,910.                        | 104,070              |
| 6      | Compensation not included above to disqualified   |                                       |                             |                                 |                      |
|        | persons (as defined under section 4958(f)(1)) and   |                                       |                             |                                 |                      |
| _      | persons described in section 4958(c)(3)(B)  | 1,556,718.                            | 1,070,382.                  | 304,779.                        | 181,557              |
| 7      | Other salaries and wages  | 1,330,710.                            | 1,070,302.                  | 304,773.                        | 101,337              |
| 8      | Pension plan accruals and contributions (include  | 19,146.                               | 13,209.                     | 3,286.                          | 2,651                |
| _      | section 401(k) and 403(b) employer contributions)   | 260,284.                              | 179,577.                    | 44,671.                         | 36,036               |
| 9      | Other employee benefits   | 138,747.                              | 130,204.                    | 379.                            | 8,164                |
| 0      | Payroll taxes   | 130,747.                              | 130,204.                    | 377.                            | 0,10                 |
| 1      | Fees for services (nonemployees):   |                                       |                             |                                 |                      |
| _      | Management  | 44,710.                               | 42,474.                     | 1,118.                          | 1,118                |
| b      | 5   | 58,529.                               | 55,603.                     | 1,463.                          | 1,463                |
|        | Accounting  | 30,323.                               | 33,003.                     | 1,403.                          | 1,400                |
|        | Lobbying Professional fundraising services. See Part IV, line 17                                  |                                       |                             |                                 |                      |
| e<br>f |   | 114,805.                              |                             | 114,805.                        |                      |
|        | Other. (If line 11g amount exceeds 10% of line 25,  |                                       |                             | 222,000                         |                      |
| 9      | column (A) amount, list line 11g expenses on Sch 0.)  | 10,397.                               | 9,877.                      | 260.                            | 260                  |
| 12     | Advertising and promotion   | 124,693.                              | 124,347.                    |                                 | 346                  |
| 13     | Office expenses   | 42,859.                               | 41,931.                     | 140.                            | 788                  |
| 4      | Information technology  | 30,273.                               | 29,121.                     | 576.                            | 576                  |
| 15     | Royalties   |                                       | ,                           |                                 |                      |
| 16     | Occupancy   | 36,513.                               | 36,325.                     | 94.                             | 94                   |
| 7      | Travel  | 15,418.                               | 11,025.                     | 240.                            | 4,153                |
| 8      | Payments of travel or entertainment expenses  |                                       | ,                           |                                 |                      |
| •      | for any federal, state, or local public officials   |                                       |                             |                                 |                      |
| 19     | Conferences, conventions, and meetings  |                                       |                             |                                 |                      |
| 20     | Interest  | 341,233.                              |                             | 341,233.                        |                      |
| 21     | Payments to affiliates  | , , , , , , , , , , , , , , , , , , , |                             | · · · · · ·                     |                      |
| 22     | Depreciation, depletion, and amortization   | 1,617,262.                            | 1,498,263.                  | 59,503.                         | 59,496               |
| .3     | Insurance   | 159,421.                              | 151,450.                    | 3,985.                          | 3,986                |
| 24     | Other expenses. Itemize expenses not covered  |                                       | -                           |                                 |                      |
|        | above (List miscellaneous expenses on line 24e. If  |                                       |                             |                                 |                      |
|        | line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule 0.) |                                       |                             |                                 |                      |
| а      | OMITED EXPENSES   | 1,285,611.                            | 1,189,139.                  | 5,838.                          | 90,634               |
| b      | LECTURES & EXHIBITS   | 260,684.                              | 260,684.                    |                                 | <u> </u>             |
| С      | IN-KIND   | 150,000.                              | 150,000.                    |                                 |                      |
| d      |   | · · ·                                 | -                           |                                 |                      |
| e      |   |                                       |                             |                                 |                      |
| :5     | Total functional expenses. Add lines 1 through 24e  | 7,138,952.                            | 5,593,206.                  | 1,050,346.                      | 495,400              |
| 26     | <b>Joint costs.</b> Complete this line only if the organization                                   |                                       | . ,                         | - '                             | ,                    |
| -      | reported in column (B) joint costs from a combined  |                                       |                             |                                 |                      |
|        | educational campaign and fundraising solicitation.  |                                       |                             |                                 |                      |
|        | Check here if following SOP 98-2 (ASC 958-720)  |                                       |                             |                                 |                      |

| Pa                          | rt X | Balance Sheet  |                                 |     |                           |
|-----------------------------|------|--|---------------------------------|-----|---------------------------|
|                             |      | Check if Schedule O contains a response or note to any line in this Part X   |                                 |     |                           |
|                             |      |  | <b>(A)</b><br>Beginning of year |     | <b>(B)</b><br>End of year |
|                             | 1    | Cash - non-interest-bearing  | 1,683,642.                      | 1   | 1,074,949.                |
|                             | 2    | Savings and temporary cash investments                                       | 404,738.                        | 2   | 404,853.                  |
|                             | 3    | Pledges and grants receivable, net   | 303,048.                        | 3   | 52,564.                   |
|                             | 4    | Accounts receivable, net   |                                 | 4   |                           |
|                             | 5    | Loans and other receivables from any current or former officer, director,    |                                 |     |                           |
|                             |      | trustee, key employee, creator or founder, substantial contributor, or 35%   |                                 |     |                           |
|                             |      | controlled entity or family member of any of these persons                   |                                 | 5   |                           |
|                             | 6    | Loans and other receivables from other disqualified persons (as defined      |                                 |     |                           |
|                             |      | under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)    |                                 | 6   |                           |
| ţ                           | 7    | Notes and loans receivable, net  |                                 | 7   |                           |
| Assets                      | 8    | Inventories for sale or use  | 152,099.                        | 8   | 213,414.                  |
| Ř                           | 9    | Prepaid expenses and deferred charges  | 131,040.                        | 9   | 77,228.                   |
|                             | 10a  | Land, buildings, and equipment: cost or other                                |                                 |     |                           |
|                             |      | basis. Complete Part VI of Schedule D 10a 40,954,365.                        |                                 |     |                           |
|                             | b    | Less: accumulated depreciation 10b 28,824,773.                               | 12,399,941.                     | 10c | 12,129,592.               |
|                             | 11   | Investments - publicly traded securities                                     | 40,860,448.                     | 11  | 33,986,354.               |
|                             | 12   | Investments - other securities. See Part IV, line 11                         | 2,961,084.                      | 12  | 11,673,543.               |
|                             | 13   | Investments - program-related. See Part IV, line 11                          |                                 | 13  |                           |
|                             | 14   | Intangible assets  | 683,300.                        | 14  | 423,165.                  |
|                             | 15   | Other assets. See Part IV, line 11   | 0.                              | 15  | 106,605.                  |
|                             | 16   | Total assets. Add lines 1 through 15 (must equal line 33)                    | 59,579,340.                     | 16  | 60,142,267.               |
|                             | 17   | Accounts payable and accrued expenses  | 1,527,157.                      | 17  | 1,222,277.                |
|                             | 18   | Grants payable   | 69,960.                         | 18  | 69,960.                   |
|                             | 19   | Deferred revenue   |                                 | 19  |                           |
|                             | 20   | Tax-exempt bond liabilities  |                                 | 20  |                           |
|                             | 21   | Escrow or custodial account liability. Complete Part IV of Schedule D        |                                 | 21  |                           |
| es                          | 22   | Loans and other payables to any current or former officer, director,         |                                 |     |                           |
| Liabilities                 |      | trustee, key employee, creator or founder, substantial contributor, or 35%   |                                 |     |                           |
| <u>ia</u>                   |      | controlled entity or family member of any of these persons                   | T 261 060                       | 22  | U 105 506                 |
| _                           | 23   | Secured mortgages and notes payable to unrelated third parties               | 7,361,960.                      | 23  | 7,185,576.                |
|                             | 24   | Unsecured notes and loans payable to unrelated third parties                 |                                 | 24  |                           |
|                             | 25   | Other liabilities (including federal income tax, payables to related third   |                                 |     |                           |
|                             |      | parties, and other liabilities not included on lines 17-24). Complete Part X |                                 |     |                           |
|                             |      | of Schedule D  | 0 050 077                       | 25  | 8,477,813.                |
|                             | 26   | Total liabilities. Add lines 17 through 25                                   | 8,959,077.                      | 26  | 0,4//,013.                |
| S                           |      | Organizations that follow FASB ASC 958, check here ▶ X                       |                                 |     |                           |
| ğ                           |      | and complete lines 27, 28, 32, and 33.                                       | 8,028,082.                      |     | 6,810,725.                |
| sala                        | 27   | Net assets without donor restrictions  | 42,592,181.                     | 27  | 44,853,729.               |
| Β                           | 28   | Net assets with donor restrictions   | 44,394,101.                     | 28  | 44,000,149.               |
| Ξ                           |      | Organizations that do not follow FASB ASC 958, check here                    |                                 |     |                           |
| ō                           |      | and complete lines 29 through 33.  |                                 |     |                           |
| ets                         | 29   | Capital stock or trust principal, or current funds                           |                                 | 29  |                           |
| SS                          | 30   | Paid-in or capital surplus, or land, building, or equipment fund             |                                 | 30  |                           |
| Net Assets or Fund Balances | 31   | Retained earnings, endowment, accumulated income, or other funds             | 50,620,263.                     | 31  | 51,664,454.               |
| ž                           | 32   | Total net assets or fund balances  | 59,579,340.                     | 32  | 60,142,267.               |
|                             | 33   | Total liabilities and net assets/fund balances                               | 33,373,340.                     | 33  | 00,142,20/.               |

Act and OMB Circular A-133? b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit

or audits, explain why on Schedule O and describe any steps taken to undergo such audits

Form 990 (2020)

Х

#### **SCHEDULE A**

(Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

# Public Charity Status and Public Support Complete if the organization is a section 501(c)(3) organization or a section

4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization THE RICHARD NIXON FOUNDATION Employer identification number 52-1278303

| <b>D</b> - |        |  |                         | XON FOUNDATI                     |                        |                    | -                                     | 2-12/0303  |
|------------|--------|--|-------------------------|----------------------------------|------------------------|--------------------|---------------------------------------|--|
| Ра         | rt I   | Reason for Public (  | Charity Status.         | All organizations must c         | omplete th             | nis part.) S       | See instructions.                     |  |
| Γhe        | organ  | ization is not a private found   | lation because it is: ( | For lines 1 through 12, o        | check only             | one box.)          |                                       |  |
| 1          |        | A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). |                         |                                  |                        |                    |                                       |  |
| 2          |        | A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990 or 990-EZ).)          |                         |                                  |                        |                    |                                       |  |
| 3          |        | A hospital or a cooperative  | hospital service orga   | anization described in <b>se</b> | ection 170             | (b)(1)(A)(i        | ii).                                  |  |
| 4          |        | A medical research organiz   | ation operated in co    | njunction with a hospital        | l described            | d in <b>sectio</b> | n 170(b)(1)(A)(iii). Enter            | the hospital's name,                             |
|            |        | city, and state:   | •                       |                                  |                        |                    |                                       | •  |
| 5          |        | An organization operated for   | or the benefit of a co  | llege or university owned        | d or opera             | ted by a g         | overnmental unit describ              | ped in   |
| _          |        | section 170(b)(1)(A)(iv). (C   |                         | ,                                |                        | , ,                |                                       |  |
| 6          |        | A federal, state, or local gov   |                         | nental unit described in         | section 17             | 70(h)(1)(A)        | (v)                                   |  |
|            | X      | An organization that norma   | _                       |                                  |                        |                    |                                       | nublic described in                              |
| •          |        | section 170(b)(1)(A)(vi). (Co  | -                       | ilitiai part of its support i    | ioiii a gov            | errineritai        | unit of from the general              | public described in                              |
| 0          |        |  | •                       | (1)(A)(vi) (Complete Bord        | + II \                 |                    |                                       |  |
| 8          | $\Box$ | A community trust describe   |                         |                                  |                        |                    |                                       | a alla ma  |
| 9          |        | An agricultural research org   |                         |                                  |                        | -                  | _                                     | -  |
|            |        | or university or a non-land-g  | grant college of agric  | ulture (see instructions).       | Enter the              | name, city         | y, and state of the collec            | je or  |
|            |        | university:  |                         |                                  |                        |                    |                                       |  |
| 10         |        | An organization that norma   | *                       |                                  | -                      |                    | · · · · · · · · · · · · · · · · · · · | *  |
|            |        | activities related to its exen   |                         | •                                | , ,                    |                    | • •                                   | •  |
|            |        | income and unrelated busing  |                         | (less section 511 tax) from      | om busine              | sses acqu          | ired by the organization              | after June 30, 1975.                             |
|            |        | See <b>section 509(a)(2).</b> (Cor   | • •                     |                                  |                        |                    |                                       |  |
| 11         | Щ      | An organization organized a  | and operated exclusi    | ively to test for public sa      | ifety. See             | section 50         | 09(a)(4).                             |  |
| 12         |        | An organization organized a  | and operated exclusi    | ively for the benefit of, to     | perform                | the functio        | ons of, or to carry out the           | e purposes of one or                             |
|            |        | more publicly supported or   | ganizations describe    | ed in <b>section 509(a)(1)</b> o | r section :            | 509(a)(2).         | See <b>section 509(a)(3).</b> (       | Check the box in                                 |
|            |        | lines 12a through 12d that   | describes the type o    | of supporting organizatio        | n and con              | nplete lines       | s 12e, 12f, and 12g.                  |  |
| а          |        | Type I. A supporting orga  | anization operated, s   | upervised, or controlled         | by its sup             | ported org         | ganization(s), typically by           | giving giving                                    |
|            |        | the supported organization   | on(s) the power to re   | gularly appoint or elect a       | a majority             | of the dire        | ctors or trustees of the s            | supporting                                       |
|            |        | organization. You must c   | omplete Part IV, Se     | ections A and B.                 |                        |                    |                                       |  |
| b          |        | Type II. A supporting orga   | anization supervised    | or controlled in connec          | tion with it           | s support          | ed organization(s), by ha             | aving  |
|            |        | control or management o  | f the supporting orga   | anization vested in the s        | ame perso              | ons that co        | ontrol or manage the sur              | ported   |
|            |        | organization(s). You mus   |                         |                                  | ·                      |                    |                                       | •  |
| С          |        | Type III functionally inte   | -                       |                                  | in connec              | tion with,         | and functionally integrat             | ed with,   |
|            |        | its supported organization   |                         |                                  |                        |                    |                                       | •  |
| d          |        | Type III non-functionally  |                         | •                                |                        |                    |                                       | ization(s)                                       |
| _          |        | that is not functionally int   |                         |                                  |                        |                    | • • • • • •                           | • •  |
|            |        | requirement (see instructi   | -                       | * .                              | •                      |                    | •                                     |  |
| е          |        | Check this box if the orga   | •                       | -                                |                        |                    |                                       |  |
| Ŭ          |        | functionally integrated, or  |                         |                                  |                        |                    | 2 1 ypc 1, 1 ypc 11, 1 ypc 111        |  |
|            | Ento   | er the number of supported of  | * *                     | nany integrated support          | ing organi             | zation.            |                                       |  |
| '          |        | ride the following information   |                         | od organization(s)               |                        |                    |                                       |  |
| <u>9</u>   |        | Name of supported  | (ii) EIN                | (iii) Type of organization       | (iv) Is the orga       | nization listed    | (v) Amount of monetary                | (vi) Amount of other                             |
|            | •      | organization   | (-,                     | (described on lines 1-10         | in your governi<br>Yes | ng document?<br>No | support (see instructions)            | support (see instructions)                       |
|            |        |  |                         | above (see instructions))        | 100                    | 140                |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
|            |        |  |                         |                                  |                        |                    |                                       |  |
| F - 4 -    |        |  |                         |                                  |                        |                    |                                       | <del>                                     </del> |

# Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

| Sec  | ction A. Public Support  |                              |                       |                           |                           |                     |             |
|------|--|------------------------------|-----------------------|---------------------------|---------------------------|---------------------|-------------|
| Cale | ndar year (or fiscal year beginning in)                                    | (a) 2016                     | <b>(b)</b> 2017       | (c) 2018                  | (d) 2019                  | (e) 2020            | (f) Total   |
| 1    | Gifts, grants, contributions, and  |                              |                       |                           |                           |                     | _           |
|      | membership fees received. (Do not  |                              |                       |                           |                           |                     |             |
|      | include any "unusual grants.")   | 2,146,943.                   | 2,946,755.            | 2,962,881.                | 1,765,968.                | 2,235,572.          | 12,058,119. |
| 2    | Tax revenues levied for the organ-   |                              |                       |                           |                           |                     |             |
|      | ization's benefit and either paid to                                       |                              |                       |                           |                           |                     |             |
|      | or expended on its behalf  |                              |                       |                           |                           |                     |             |
| 3    | The value of services or facilities  |                              |                       |                           |                           |                     | _           |
|      | furnished by a governmental unit to  |                              |                       |                           |                           |                     |             |
|      | the organization without charge  |                              |                       |                           |                           |                     |             |
| 4    | Total. Add lines 1 through 3   | 2,146,943.                   | 2,946,755.            | 2,962,881.                | 1,765,968.                | 2,235,572.          | 12,058,119. |
| 5    | The portion of total contributions   |                              |                       |                           |                           |                     |             |
|      | by each person (other than a   |                              |                       |                           |                           |                     |             |
|      | governmental unit or publicly  |                              |                       |                           |                           |                     |             |
|      | supported organization) included   |                              |                       |                           |                           |                     |             |
|      | on line 1 that exceeds 2% of the   |                              |                       |                           |                           |                     |             |
|      | amount shown on line 11,   |                              |                       |                           |                           |                     |             |
|      | column (f)   |                              |                       |                           |                           |                     | 826,735.    |
| 6    | Public support. Subtract line 5 from line 4.                               |                              |                       |                           |                           |                     | 11,231,384. |
| Sec  | ction B. Total Support   |                              | _                     | _                         |                           |                     |             |
| Cale | ndar year (or fiscal year beginning in) 🕨                                  | (a) 2016                     | <b>(b)</b> 2017       | (c) 2018                  | (d) 2019                  | (e) 2020            | (f) Total   |
| 7    | Amounts from line 4  | 2,146,943.                   | 2,946,755.            | 2,962,881.                | 1,765,968.                | 2,235,572.          | 12,058,119. |
| 8    | Gross income from interest,  |                              |                       |                           |                           |                     | _           |
|      | dividends, payments received on  |                              |                       |                           |                           |                     |             |
|      | securities loans, rents, royalties,  |                              |                       |                           |                           |                     |             |
|      | and income from similar sources  | 2,629,451.                   | 3,061,021.            | 2,886,650.                | 3,260,299.                | 1,352,649.          | 13,190,070. |
| 9    | Net income from unrelated business   |                              |                       |                           |                           |                     |             |
|      | activities, whether or not the   |                              |                       |                           |                           |                     |             |
|      | business is regularly carried on   |                              |                       | 5,014.                    |                           |                     | 5,014.      |
| 10   | Other income. Do not include gain  |                              |                       |                           |                           |                     |             |
|      | or loss from the sale of capital   |                              |                       |                           |                           |                     |             |
|      | assets (Explain in Part VI.)   | 1,339.                       | 861.                  | 1,789.                    | 7,139.                    | 1,165.              | 12,293.     |
| 11   | Total support. Add lines 7 through 10                                      |                              |                       |                           |                           |                     | 25,265,496. |
| 12   | Gross receipts from related activities,                                    | etc. (see instruction        | ons)                  |                           |                           | 12 3                | ,584,748.   |
| 13   | First 5 years. If the Form 990 is for th                                   | e organization's fir         | st, second, third, fo | ourth, or fifth tax y     | ear as a section 5        | 501(c)(3)           |             |
|      | organization, check this box and stop                                      | here                         |                       |                           |                           |                     | <b>&gt;</b> |
| Sec  | ction C. Computation of Publ   | ic Support Per               | centage               |                           |                           |                     |             |
| 14   | Public support percentage for 2020 (I                                      | ine 6, column (f), d         | ivided by line 11, c  | olumn (f))                |                           | 14                  | 44.45 %     |
| 15   | Public support percentage from 2019  | Schedule A, Part             | II, line 14           |                           |                           | 15                  | 39.83 %     |
| 16a  | 33 1/3% support test - 2020. If the o                                      | •                            |                       | •                         |                           | •                   |             |
|      | stop here. The organization qualifies as a publicly supported organization |                              |                       |                           |                           |                     |             |
| b    | 33 1/3% support test - 2019. If the o                                      |                              |                       |                           |                           |                     |             |
|      | and <b>stop here.</b> The organization qual                                | ifies as a publicly s        | upported organiza     | tion                      |                           |                     | ▶□          |
| 17a  | 10% -facts-and-circumstances tes   | -                            |                       |                           |                           |                     |             |
|      | and if the organization meets the fact                                     | s-and-circumstance           | es test, check this   | box and <b>stop here</b>  | e. Explain in Part        | VI how the organiz  | ation       |
|      | meets the facts-and-circumstances to                                       | est. The organization        | n qualifies as a pul  | blicly supported or       | rganization               |                     | ▶□          |
| b    | 10% -facts-and-circumstances tes   | t - <b>2019.</b> If the orga | anization did not ch  | neck a box on line        | 13, 16a, 16b, or          | 17a, and line 15 is | 10% or      |
|      | more, and if the organization meets the                                    | ne facts-and-circum          | nstances test, chec   | k this box and <b>sto</b> | <b>p here.</b> Explain ir | Part VI how the     |             |
|      | organization meets the facts-and-circu                                     | umstances test. Th           | e organization qua    | lifies as a publicly      | supported organ           | ization             | ▶Щ          |
| 18   | Private foundation. If the organization                                    | n did not check a b          | oox on line 13, 16a   | , 16b, 17a, or 17b,       | check this box a          | nd see instruction  | s ▶∟        |

Schedule A (Form 990 or 990-EZ) 2020

# Part III | Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

| Se | qualify under the tests listed be ction A. Public Support  | low, please com    | plete Part II.)      |                      |                   |                      |              |  |
|----|--|--------------------|----------------------|----------------------|-------------------|----------------------|--------------|--|
|    | endar year (or fiscal year beginning in)   | (a) 2016           | <b>(b)</b> 2017      | (c) 2018             | (d) 2019          | (e) 2020             | (f) Total    |  |
|    | Gifts, grants, contributions, and  | (a) 2010           | (6) 2017             | (6) 2018             | (u) 2019          | ( <del>e)</del> 2020 | (i) iotai    |  |
| '  | membership fees received. (Do not  |                    |                      |                      |                   |                      |              |  |
|    | include any "unusual grants.")   |                    |                      |                      |                   |                      |              |  |
| 2  | Gross receipts from admissions,  |                    |                      |                      |                   |                      |              |  |
| 2  | merchandise sold or services per-  |                    |                      |                      |                   |                      |              |  |
|    | formed, or facilities furnished in   |                    |                      |                      |                   |                      |              |  |
|    | any activity that is related to the organization's tax-exempt purpose  |                    |                      |                      |                   |                      |              |  |
| 2  | Gross receipts from activities that  |                    |                      |                      |                   |                      |              |  |
| 3  | are not an unrelated trade or bus-   |                    |                      |                      |                   |                      |              |  |
|    | inoccupidor contion 512  |                    |                      |                      |                   |                      |              |  |
| 1  | Tax revenues levied for the organ  |                    |                      |                      |                   |                      |              |  |
| 7  | ization's benefit and either paid to   |                    |                      |                      |                   |                      |              |  |
|    | or expended on its behalf  |                    |                      |                      |                   |                      |              |  |
| 5  | The value of services or facilities  |                    |                      |                      |                   |                      |              |  |
| 3  | furnished by a governmental unit to  |                    |                      |                      |                   |                      |              |  |
|    | the organization without charge  |                    |                      |                      |                   |                      |              |  |
| 6  | Total. Add lines 1 through 5   |                    |                      |                      |                   |                      |              |  |
|    | Amounts included on lines 1, 2, and  |                    |                      |                      |                   |                      |              |  |
| ,, | 3 received from disqualified persons   |                    |                      |                      |                   |                      |              |  |
| k  | Amounts included on lines 2 and 3 received   |                    |                      |                      |                   |                      |              |  |
|    | from other than disqualified persons that  |                    |                      |                      |                   |                      |              |  |
|    | exceed the greater of \$5,000 or 1% of the amount on line 13 for the year  |                    |                      |                      |                   |                      |              |  |
| ,  | Add lines 7a and 7b  |                    |                      |                      |                   |                      |              |  |
|    | Public support. (Subtract line 7c from line 6.)  |                    |                      |                      |                   |                      |              |  |
|    | ction B. Total Support   |                    |                      |                      |                   |                      |              |  |
|    | endar year (or fiscal year beginning in)   | (a) 2016           | <b>(b)</b> 2017      | (c) 2018             | (d) 2019          | (e) 2020             | (f) Total    |  |
|    | Amounts from line 6  | (4) 2010           | (2) 23 11            | (0) 2010             | (4) 2010          | (6) 2020             | (i) rotal    |  |
|    | Gross income from interest,  |                    |                      |                      |                   |                      |              |  |
|    | dividends, payments received on  |                    |                      |                      |                   |                      |              |  |
|    | securities loans, rents, royalties, and income from similar sources  |                    |                      |                      |                   |                      |              |  |
| ŀ  | Unrelated business taxable income  |                    |                      |                      |                   |                      |              |  |
|    | (less section 511 taxes) from businesses   |                    |                      |                      |                   |                      |              |  |
|    | acquired after June 30, 1975   |                    |                      |                      |                   |                      |              |  |
| ,  | Add lines 10a and 10b  |                    |                      |                      |                   |                      |              |  |
|    | Net income from unrelated business   |                    |                      |                      |                   |                      |              |  |
|    | activities not included in line 10b,   |                    |                      |                      |                   |                      |              |  |
|    | whether or not the business is regularly carried on  |                    |                      |                      |                   |                      |              |  |
| 12 | Other income. Do not include gain  |                    |                      |                      |                   |                      |              |  |
|    | or loss from the sale of capital   |                    |                      |                      |                   |                      |              |  |
| 13 | assets (Explain in Part VI.)   |                    |                      |                      |                   |                      |              |  |
|    | First 5 years. If the Form 990 is for the  | e organization's f | irst, second, third, | fourth, or fifth tax | vear as a section | 501(c)(3) organizat  | ion.         |  |
|    | ala a de Alaia la accessa de Alaia la acces  | •                  |                      |                      |                   | . , . ,              | ,<br>▶□      |  |
| Se | ction C. Computation of Publi  |                    |                      |                      |                   |                      |              |  |
|    | Public support percentage for 2020 (li   |                    |                      | column (f))          |                   | 15                   | %            |  |
|    | Public support percentage from 2019  |                    |                      |                      |                   | 16                   | %            |  |
|    | ction D. Computation of Inves  |                    |                      |                      |                   |                      | -            |  |
| 17 | Investment income percentage for 202   | 20 (line 10c, colu | mn (f), divided by I | ine 13, column (f))  |                   | 17                   | %            |  |
| 18 | Investment income percentage from 2  |                    |                      |                      |                   | 18                   | %            |  |
|    | a 33 1/3% support tests - 2020. If the   |                    |                      |                      |                   |                      |              |  |
|    | more than 33 1/3%, check this box an   |                    |                      |                      |                   |                      | ightharpoons |  |
| k  | 33 1/3% support tests - 2019. If the   |                    |                      |                      |                   |                      | and          |  |
|    | line 18 is not more than 33 1/3%, chec   |                    |                      |                      |                   |                      |              |  |
| 20 | Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions |                    |                      |                      |                   |                      |              |  |

# Part IV | Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

#### Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in **Part VI** how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- **3a** Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.
- **b** Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in **Part VI** when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.
- **4a** Was any supported organization not organized in the United States ("foreign supported organization")? *If* "Yes," *and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.*
- **b** Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in **Part VI** how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- **b** Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- **9a** Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in **Part VI.**
- **b** Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI.
- c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- 10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.
  - **b** Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

|     | Yes | No |
|-----|-----|----|
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| 10a |     |    |
| 10b |     |    |

| Pa  | rt IV Supporting Organizations (continued)   |          |      |    |
|-----|--|----------|------|----|
|     |  |          | Yes  | No |
| 11  | Has the organization accepted a gift or contribution from any of the following persons?  |          |      |    |
| а   | A person who directly or indirectly controls, either alone or together with persons described in lines 11b and   |          |      |    |
|     | 11c below, the governing body of a supported organization?   | 11a      |      |    |
| b   | A family member of a person described in line 11a above?   | 11b      |      |    |
| С   | A 35% controlled entity of a person described in line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide   |          |      |    |
|     | detail in Part VI.   | 11c      |      |    |
| Sec | tion B. Type I Supporting Organizations  |          |      |    |
|     |  |          | Yes  | No |
| 1   | Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or   |          |      |    |
|     | more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) |          |      |    |
|     | effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported   |          |      |    |
|     | organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the   |          |      |    |
|     | supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.   | 1        |      |    |
| 2   | Did the organization operate for the benefit of any supported organization other than the supported  |          |      |    |
|     | organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in   |          |      |    |
|     | Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,  |          |      |    |
|     | supervised, or controlled the supporting organization.   | 2        |      |    |
| Sec | tion C. Type II Supporting Organizations   |          |      |    |
|     |  |          | Yes  | No |
| 1   | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors   |          |      |    |
|     | or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control  |          |      |    |
|     | or management of the supporting organization was vested in the same persons that controlled or managed   |          |      |    |
|     | the supported organization(s).   | 1        |      |    |
| Sec | tion D. All Type III Supporting Organizations  |          |      |    |
|     |  |          | Yes  | No |
| 1   | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the   |          |      |    |
|     | organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax  |          |      |    |
|     | year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the   |          |      |    |
|     | organization's governing documents in effect on the date of notification, to the extent not previously provided?   | 1        |      |    |
| 2   | Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported   |          |      |    |
|     | organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how   |          |      |    |
|     | the organization maintained a close and continuous working relationship with the supported organization(s).  | 2        |      |    |
| 3   | By reason of the relationship described in line 2, above, did the organization's supported organizations have a  |          |      |    |
|     | significant voice in the organization's investment policies and in directing the use of the organization's   |          |      |    |
|     | income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's   |          |      |    |
|     | supported organizations played in this regard.   | 3        |      |    |
| Sec | tion E. Type III Functionally Integrated Supporting Organizations  |          |      |    |
| 1   | Check the box next to the method that the organization used to satisfy the Integral Part Test during the yea(see instructions)   | -        |      |    |
| а   | The organization satisfied the Activities Test. Complete line 2 below.   |          |      |    |
| b   | The organization is the parent of each of its supported organizations. Complete line 3 below.  |          |      |    |
| С   | The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see in  | structio | ns). |    |
| 2   | Activities Test. Answer lines 2a and 2b below.   |          | Yes  | No |
| а   | Did substantially all of the organization's activities during the tax year directly further the exempt purposes of   |          |      |    |
|     | the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify   |          |      |    |
|     | those supported organizations and explain how these activities directly furthered their exempt purposes,   |          |      |    |
|     | how the organization was responsive to those supported organizations, and how the organization determined  |          |      |    |
|     | that these activities constituted substantially all of its activities.   | 2a       |      |    |
| b   | Did the activities described in line 2a, above, constitute activities that, but for the organization's involvement,  |          |      |    |
|     | one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in   |          |      |    |
|     | Part VI the reasons for the organization's position that its supported organization(s) would have engaged in   |          |      |    |
|     | these activities but for the organization's involvement.   | 2b       |      |    |
| 3   | Parent of Supported Organizations. Answer lines 3a and 3b below.   |          |      |    |
| а   |  |          |      |    |
|     | trustees of each of the supported organizations? If "Yes" or "No" provide details in Part VI.  | 3a       |      |    |
| b   |  |          |      |    |
|     | of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.  | 3b       |      |    |

| Pa   | art V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations                               |                |                                     |                                |  |  |  |  |
|------|---|----------------|-------------------------------------|--------------------------------|--|--|--|--|
| 1    | Check here if the organization satisfied the Integral Part Test as a qualifyi                               | ng trust on    | Nov. 20, 1970 (e <i>xplain in</i> I | Part VI). See instructions.    |  |  |  |  |
|      | All other Type III non-functionally integrated supporting organizations must complete Sections A through E. |                |                                     |                                |  |  |  |  |
| Sect | ion A - Adjusted Net Income   | (A) Prior Year | (B) Current Year<br>(optional)      |                                |  |  |  |  |
| 1    | Net short-term capital gain   | 1              |                                     |                                |  |  |  |  |
| 2    | Recoveries of prior-year distributions  | 2              |                                     |                                |  |  |  |  |
| 3    | Other gross income (see instructions)   | 3              |                                     |                                |  |  |  |  |
| 4    | Add lines 1 through 3.  | 4              |                                     |                                |  |  |  |  |
| 5    | Depreciation and depletion  | 5              |                                     |                                |  |  |  |  |
| 6    | Portion of operating expenses paid or incurred for production or  |                |                                     |                                |  |  |  |  |
|      | collection of gross income or for management, conservation, or  |                |                                     |                                |  |  |  |  |
|      | maintenance of property held for production of income (see instructions)                                    | 6              |                                     |                                |  |  |  |  |
| 7    | Other expenses (see instructions)   | 7              |                                     |                                |  |  |  |  |
| 8    | Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)  | 8              |                                     |                                |  |  |  |  |
| Sect | ion B - Minimum Asset Amount  |                | (A) Prior Year                      | (B) Current Year<br>(optional) |  |  |  |  |
| 1    | Aggregate fair market value of all non-exempt-use assets (see   |                |                                     |                                |  |  |  |  |
|      | instructions for short tax year or assets held for part of year):   |                |                                     |                                |  |  |  |  |
| а    | Average monthly value of securities   | 1a             |                                     |                                |  |  |  |  |
| b    | Average monthly cash balances   | 1b             |                                     |                                |  |  |  |  |
| c    | Fair market value of other non-exempt-use assets  | 1c             |                                     |                                |  |  |  |  |
| d    | Total (add lines 1a, 1b, and 1c)  | 1d             |                                     |                                |  |  |  |  |
| е    | Discount claimed for blockage or other factors  |                |                                     |                                |  |  |  |  |
|      | (explain in detail in <b>Part VI</b> ):   |                |                                     |                                |  |  |  |  |
| 2    | Acquisition indebtedness applicable to non-exempt-use assets  | 2              |                                     |                                |  |  |  |  |
| 3    | Subtract line 2 from line 1d.   | 3              |                                     |                                |  |  |  |  |
| 4    | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount,                                 |                |                                     |                                |  |  |  |  |
|      | see instructions).  | 4              |                                     |                                |  |  |  |  |
| 5    | Net value of non-exempt-use assets (subtract line 4 from line 3)  | 5              |                                     |                                |  |  |  |  |
| 6    | Multiply line 5 by 0.035.   | 6              |                                     |                                |  |  |  |  |
| 7    | Recoveries of prior-year distributions  | 7              |                                     |                                |  |  |  |  |
| 8    | Minimum Asset Amount (add line 7 to line 6)   | 8              |                                     |                                |  |  |  |  |
| Sect | ion C - Distributable Amount  |                |                                     | Current Year                   |  |  |  |  |
| 1    | Adjusted net income for prior year (from Section A, line 8, column A)                                       | 1              |                                     |                                |  |  |  |  |
| 2    | Enter 0.85 of line 1.   | 2              |                                     |                                |  |  |  |  |
| 3    | Minimum asset amount for prior year (from Section B, line 8, column A)                                      | 3              |                                     |                                |  |  |  |  |
| 4    | Enter greater of line 2 or line 3.  | 4              |                                     |                                |  |  |  |  |
| 5    | Income tax imposed in prior year  | 5              |                                     |                                |  |  |  |  |
| 6    | Distributable Amount. Subtract line 5 from line 4, unless subject to  |                |                                     |                                |  |  |  |  |
|      | emergency temporary reduction (see instructions).   | 6              |                                     |                                |  |  |  |  |
| 7    | Check here if the current year is the organization's first as a non-functional                              | ally integrate | ed Type III supporting org          | anization (see                 |  |  |  |  |
|      | instructions).  |                |                                     |                                |  |  |  |  |

Schedule A (Form 990 or 990-EZ) 2020

| Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued) |   |                               |                                       |              |   |  |  |
|--|---|-------------------------------|---------------------------------------|--------------|---|--|--|
| Sect   | ion D - Distributions   | •                             |                                       | Current Year |   |  |  |
| 1  | Amounts paid to supported organizations to accomplish exe       |                               | 1                                     |              |   |  |  |
| 2  | Amounts paid to perform activity that directly furthers exemple | pt purposes of supported      |                                       |              |   |  |  |
|  | organizations, in excess of income from activity                |                               |                                       | 2            |   |  |  |
| 3  | Administrative expenses paid to accomplish exempt purpos        | es of supported organization  | ns                                    | 3            |   |  |  |
| 4  | Amounts paid to acquire exempt-use assets                       |                               |                                       | 4            |   |  |  |
| 5  | Qualified set-aside amounts (prior IRS approval required - pro  | ovide details in Part VI)     |                                       | 5            |   |  |  |
| 6  | Other distributions (describe in Part VI). See instructions.    |                               |                                       | 6            |   |  |  |
| 7  | Total annual distributions. Add lines 1 through 6.              |                               |                                       | 7            |   |  |  |
| 8  | Distributions to attentive supported organizations to which t   | he organization is responsive | Э                                     |              |   |  |  |
|  | (provide details in Part VI). See instructions.                 |                               |                                       | 8            |   |  |  |
| 9  | Distributable amount for 2020 from Section C, line 6            |                               |                                       | 9            |   |  |  |
| 10   | Line 8 amount divided by line 9 amount                          |                               |                                       | 10           |   |  |  |
| Sect   | ion E - Distribution Allocations (see instructions)             | (i)<br>Excess Distributions   | (ii)<br>Underdistribution<br>Pre-2020 | ıs           | (iii)<br>Distributable<br>Amount for 2020 |  |  |
| 1  | Distributable amount for 2020 from Section C, line 6            |                               |                                       |              |   |  |  |
| 2  | Underdistributions, if any, for years prior to 2020 (reason-    |                               |                                       |              |   |  |  |
|  | able cause required - explain in Part VI). See instructions.    |                               |                                       |              |   |  |  |
| 3  | Excess distributions carryover, if any, to 2020                 |                               |                                       |              |   |  |  |
| а  | From 2015   |                               |                                       |              |   |  |  |
| b  | From 2016   |                               |                                       |              |   |  |  |
| c  | From 2017   |                               |                                       |              |   |  |  |
| d  | From 2018   |                               |                                       |              |   |  |  |
| е  | From 2019   |                               |                                       |              |   |  |  |
| f  | Total of lines 3a through 3e                                    |                               |                                       |              |   |  |  |
| g  | Applied to underdistributions of prior years                    |                               |                                       |              |   |  |  |
| h  | Applied to 2020 distributable amount                            |                               |                                       |              |   |  |  |
| i  | Carryover from 2015 not applied (see instructions)              |                               |                                       |              |   |  |  |
| j  | Remainder. Subtract lines 3g, 3h, and 3i from line 3f.          |                               |                                       |              |   |  |  |
| 4  | Distributions for 2020 from Section D,                          |                               |                                       |              |   |  |  |
|  | line 7: \$  |                               |                                       |              |   |  |  |
| a  | Applied to underdistributions of prior years                    |                               |                                       |              |   |  |  |
| b  | Applied to 2020 distributable amount                            |                               |                                       |              |   |  |  |
| c  | Remainder. Subtract lines 4a and 4b from line 4.                |                               |                                       |              |   |  |  |
| 5  | Remaining underdistributions for years prior to 2020, if        |                               |                                       |              |   |  |  |
|  | any. Subtract lines 3g and 4a from line 2. For result greater   |                               |                                       |              |   |  |  |
|  | than zero, explain in Part VI. See instructions.                |                               |                                       |              |   |  |  |
| 6  | Remaining underdistributions for 2020. Subtract lines 3h        |                               |                                       |              |   |  |  |
|  | and 4b from line 1. For result greater than zero, explain in    |                               |                                       |              |   |  |  |
|  | Part VI. See instructions.                                      |                               |                                       |              |   |  |  |
| 7  | Excess distributions carryover to 2021. Add lines 3j            |                               |                                       |              |   |  |  |
|  | and 4c.   |                               |                                       |              |   |  |  |
| _8_  | Breakdown of line 7:  |                               |                                       |              |   |  |  |
| а  | Excess from 2016  |                               |                                       |              |   |  |  |

Schedule A (Form 990 or 990-EZ) 2020

b Excess from 2017c Excess from 2018d Excess from 2019e Excess from 2020

| Part VI | Company of the Control of the Contro |
|---------|--|
| rait VI | Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12;  |
|         | Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C,   |
|         | line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V,   |
|         | Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  |
|         | (See instructions.)  |
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Schedule B

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

Department of the Treasury Internal Revenue Service **Schedule of Contributors** 

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

➤ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

Name of the organization

Employer identification number

THE RICHARD NIXON FOUNDATION

52-1278303

| Organization type (check one):   |   |  |  |  |  |  |  |
|--|---|--|--|--|--|--|--|
| Filers of:   |   | Section:   |  |  |  |  |  |
| Form 990 o   | r 990-EZ  | X 501(c)( 3 ) (enter number) organization  |  |  |  |  |  |
|  | 1   | 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation   |  |  |  |  |  |
|  | I   | 527 political organization   |  |  |  |  |  |
| Form 990-P   | F   | 501(c)(3) exempt private foundation  |  |  |  |  |  |
|  | I   | 4947(a)(1) nonexempt charitable trust treated as a private foundation  |  |  |  |  |  |
|  | I   | 501(c)(3) taxable private foundation   |  |  |  |  |  |
| 01 1 17  |   |  |  |  |  |  |  |
| •  | · ·   | covered by the <b>General Rule</b> or a <b>Special Rule.</b> ), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.  |  |  |  |  |  |
| General Ru   | le  |  |  |  |  |  |  |
|  | -   | filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.   |  |  |  |  |  |
| Special Rul  | les   |  |  |  |  |  |  |
| sec<br>an  | ctions 509(a)(1) ar<br>y one contributor,   | described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under nd 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; ine 1. Complete Parts I and II.  |  |  |  |  |  |
| col  | For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III. |  |  |  |  |  |  |
| yea<br>is d<br>pu  | ar, contributions e<br>checked, enter he<br>rpose. Don't com  | described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box are the total contributions that were received during the year for an exclusively religious, charitable, etc., plete any of the parts unless the <b>General Rule</b> applies to this organization because it received nonexclusively etc., contributions totaling \$5,000 or more during the year \bigsim \b |  |  |  |  |  |
| Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF). |   |  |  |  |  |  |  |

 $\ \, \text{LHA} \ \, \text{For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.}$ 

Schedule B (Form 990, 990-EZ, or 990-PF) (2020)

# THE RICHARD NIXON FOUNDATION

52-1278303

| Part I     | Contributors (see instructions). Use duplicate copies of Part I if additional | Il space is needed.        |  |
|------------|---|----------------------------|--|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
| 1          |   | \$\$                       | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
| 2          |   | \$\$                       | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c) Total contributions    | (d)<br>Type of contribution  |
| 3          |   | \$51,582.                  | Person Payroll Noncash X (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c) Total contributions    | (d) Type of contribution   |
| 4          | Name, address, and Zir + 4  | \$\$                       | Person X Payroll Noncash (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d) Type of contribution   |
| 5          |   | \$ 600,000.                | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   | \$                         | Person Payroll Noncash  (Complete Part II for noncash contributions.)  |

Name of organization Employer identification number

# THE RICHARD NIXON FOUNDATION

52-1278303

| Part II                      | Noncash Property (see instructions). Use duplicate copies of P | art II if additional space is needed.     |                            |
|------------------------------|--|---|----------------------------|
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                     | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received       |
|                              | 1120 SHARES OF XENCOR (XNCR)                                   |   |                            |
| 3                            |  |   |                            |
|                              |  | \$\$1,582.                                | 12/31/20                   |
| (a)<br>No.<br>from<br>Part I | (b)<br>Description of noncash property given                   | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received       |
|                              |  | <br><br>\$                                |                            |
|                              |  | a   |                            |
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                     | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received       |
|                              |  |   |                            |
|                              |  |   |                            |
|                              |  | \$  |                            |
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                     | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received       |
|                              |  |   |                            |
|                              |  |   |                            |
|                              |  | \$  |                            |
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                     | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received       |
|                              |  |   |                            |
|                              |  |   |                            |
|                              |  | \$  |                            |
| (a)<br>No.<br>from           | (b)  Description of noncash property given                     | (c) FMV (or estimate)                     | (d)<br>Date received       |
| Part I                       |  | (See instructions.)                       |                            |
|                              |  |   |                            |
|                              |  | <u> </u>                                  |                            |
| 453 11-25                    |  | \$  | 990. 990-EZ. or 990-PF) (2 |

Name of organization **Employer identification number** 52-1278303 THE RICHARD NIXON FOUNDATION Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) Use duplicate copies of Part III if additional space is needed. (a) No. `fŕom Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

### **SCHEDULE D** (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

► Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

► Attach to Form 990.

►Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047 Open to Public Inspection

Name of the organization

THE RICHARD NIXON FOUNDATION

**Employer identification number** 52-1278303

| Pai    | rt I Organizations Maintaining Donor Advise  | ed Funds or Other Similar Funds or                | Accounts. Complete if the       |
|--------|--|---|---------------------------------|
|        | organization answered "Yes" on Form 990, Part IV, lin  | ne 6.   |                                 |
|        |  | (a) Donor advised funds                           | (b) Funds and other accounts    |
| 1      | Total number at end of year  |   |                                 |
| 2      | Aggregate value of contributions to (during year)  |   |                                 |
| 3      | Aggregate value of grants from (during year)   |   |                                 |
| 4      | Aggregate value at end of year   |   |                                 |
| 5      | Did the organization inform all donors and donor advisors in   | writing that the assets held in donor advised f   | unds                            |
|        | are the organization's property, subject to the organization's   | exclusive legal control?                          | Yes No                          |
| 6      | Did the organization inform all grantees, donors, and donor a  | dvisors in writing that grant funds can be use    | d only                          |
|        | for charitable purposes and not for the benefit of the donor of  | or donor advisor, or for any other purpose con    | ferring                         |
|        |  |   |                                 |
| Pai    | rt II Conservation Easements. Complete if the org  | ganization answered "Yes" on Form 990, Part       | IV, line 7.                     |
| 1      | Purpose(s) of conservation easements held by the organization  |   |                                 |
|        | Preservation of land for public use (for example, recrea   |   | storically important land area  |
|        | Protection of natural habitat  | Preservation of a ce                              | ertified historic structure     |
|        | Preservation of open space   |   |                                 |
| 2      | Complete lines 2a through 2d if the organization held a quality  | fied conservation contribution in the form of a   |                                 |
|        | day of the tax year.   |   | Held at the End of the Tax Year |
|        | Total number of conservation easements   |   |                                 |
|        | Total acreage restricted by conservation easements   |   | •                               |
|        | Number of conservation easements on a certified historic str   |   | . 2c                            |
| a      | Number of conservation easements included in (c) acquired  |   |                                 |
| •      | listed in the National Register  |   | 2d                              |
| 3      | Number of conservation easements modified, transferred, re   | leased, extinguished, or terminated by the org    | ganization during the tax       |
| 4      | year   | coment is leasted                                 |                                 |
| 4<br>5 | Number of states where property subject to conservation ea   |   |                                 |
| 3      | Does the organization have a written policy regarding the per<br>violations, and enforcement of the conservation easements i |   | Yes No                          |
| 6      | Staff and volunteer hours devoted to monitoring, inspecting,   |   |                                 |
| Ū      | b  | Transming of Violations, and emoreting conserve   | ation casements during the year |
| 7      | Amount of expenses incurred in monitoring, inspecting, hand  | dling of violations, and enforcing conservation   | easements during the year       |
| -      | <b>\$</b>  | annig on molations, and other only contact ration | caseee adming and year          |
| 8      | Does each conservation easement reported on line 2(d) above  | ve satisfy the requirements of section 170(h)(4   | 4)(B)(i)                        |
|        | and section 170(h)(4)(B)(ii)?  | •           |                                 |
| 9      | In Part XIII, describe how the organization reports conservati   |   |                                 |
|        | balance sheet, and include, if applicable, the text of the footi   | -   |                                 |
|        | organization's accounting for conservation easements.  |   |                                 |
| Pai    | rt III Organizations Maintaining Collections o   | f Art, Historical Treasures, or Othe              | r Similar Assets.               |
|        | Complete if the organization answered "Yes" on Form  | n 990, Part IV, line 8.                           |                                 |
| 1a     | If the organization elected, as permitted under FASB ASC 95  | 58, not to report in its revenue statement and I  | balance sheet works             |
|        | of art, historical treasures, or other similar assets held for pul   | olic exhibition, education, or research in furthe | erance of public                |
|        | service, provide in Part XIII the text of the footnote to its final  | ncial statements that describes these items.      |                                 |
| b      | If the organization elected, as permitted under FASB ASC 95  | 58, to report in its revenue statement and bala   | nce sheet works of              |
|        | art, historical treasures, or other similar assets held for public   | exhibition, education, or research in furtheral   | nce of public service,          |
|        | provide the following amounts relating to these items:   |   |                                 |
|        | (i) Revenue included on Form 990, Part VIII, line 1  |   | ·                               |
|        | (ii) Assets included in Form 990, Part X   |   |                                 |
| 2      | If the organization received or held works of art, historical tre  | asures, or other similar assets for financial gai | in, provide                     |
|        | the following amounts required to be reported under FASB A   |   |                                 |
|        | Revenue included on Form 990, Part VIII, line 1  |   | ·                               |
|        | Assets included in Form 990, Part X  |   |                                 |
| LHA    | For Paperwork Reduction Act Notice, see the Instruction  | s for Form 990.                                   | Schedule D (Form 990) 2020      |

032051 12-01-20

| Pai | t III Organizations Maintaining C   | ollections of Ar        | t, Historical Tr       | easures, c    | or Othe                                 | er Sim     | ilar Asse     | <b>ts</b> (contir | nued)         |      |  |
|-----|---|-------------------------|------------------------|---------------|---|------------|---------------|-------------------|---------------|------|--|
| 3   | Using the organization's acquisition, accessi   | on, and other records   | s, check any of the    | following tha | t make s                                | significar | nt use of its |                   |               |      |  |
|     | collection items (check all that apply):  |                         |                        |               |   |            |               |                   |               |      |  |
| а   | Public exhibition   | d                       | Loan or excl           | hange progra  | ım                                      |            |               |                   |               |      |  |
| b   | Scholarly research  | е                       | Other                  |               |   |            |               |                   |               |      |  |
| С   |   |                         |                        |               |   |            |               |                   |               |      |  |
| 4   |   |                         |                        |               |   |            |               |                   |               |      |  |
| 5   |   |                         |                        |               |   |            |               |                   |               |      |  |
|     | to be sold to raise funds rather than to be ma  |                         |                        |               |   |            |               | Yes               |               | No   |  |
| Pai | t IV Escrow and Custodial Arran   |                         |                        |               |   |            |               | line 9, or        |               |      |  |
|     | reported an amount on Form 990, Par   | -                       | · ·                    |               |   |            |               | ŕ                 |               |      |  |
| 1a  | Is the organization an agent, trustee, custodi  | an or other intermed    | iary for contribution  | s or other as | sets not                                | include    | d             |                   |               |      |  |
|     | on Form 990, Part X?  |                         |                        |               |   |            |               | Yes               |               | No   |  |
| b   | If "Yes," explain the arrangement in Part XIII  | and complete the fol    | lowing table:          |               |   |            |               |                   |               |      |  |
|     | -   |                         | -                      |               |   |            |               | Amoun             | t             |      |  |
| С   | Beginning balance   |                         |                        |               |   | 1c         |               |                   |               |      |  |
|     | Additions during the year   |                         |                        |               |   |            |               |                   |               |      |  |
|     | Distributions during the year   |                         |                        |               |   |            |               |                   |               |      |  |
| f   | Ending balance  |                         |                        |               |   | 1f         |               |                   |               |      |  |
|     | Did the organization include an amount on Fo  |                         |                        |               |   |            |               | Yes               |               | No   |  |
|     | If "Yes," explain the arrangement in Part XIII.   |                         |                        |               |   | •          |               |                   |               | ]    |  |
| Pai |   |                         |                        |               |   |            |               |                   |               |      |  |
|     |   | (a) Current year        | (b) Prior year         | (c) Two year  |   |            | vears hack    | (e) Four          | vears         | hack |  |
| 10  | Beginning of year balance   | 41,710,375.             | 38,597,923.            |               |   |            | 976,640.      |                   | ,853,         |      |  |
|     | To the second | 11,710,373.             | 30,337,323.            | 13,010        | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, |            | 370,010.      | - 30              | , , ,         | 333. |  |
|     | Contributions   | 4,991,336.              | 5,145,398.             | -3,277        | 7 976                                   | 5          | 737,860.      | 2                 | ,784,         | 089  |  |
|     | Net investment earnings, gains, and losses  | 4,551,550.              | 3,143,330.             | 3,277         | ,,,,,,,,,                               | <u>_</u>   | 737,000.      |                   | , , , ,       | 005. |  |
|     | Grants or scholarships  |                         |                        |               |   |            |               |                   |               |      |  |
| е   | Other expenditures for facilities   | 2 512 057               | 1 021 016              | 1 050         | , 772                                   | 1          | 751 700       | 1                 | EΕΛ           | 252  |  |
| _   | and programs  | 2,513,957.              | 1,931,016.             |               | 773.                                    |            | 751,708.      |                   | ,550 <u>,</u> |      |  |
|     | Administrative expenses   | 44 405 554              | 101,930.               |               | ,412.                                   |            | 116,708.      |                   | 110,          |      |  |
| g   | End of year balance   | 44,187,754.             | 41,710,375.            |               | 7,923.                                  | 43,        | 846,084.      | 39                | ,976,         | 640. |  |
| 2   | Provide the estimated percentage of the curr  |                         | e (line 1g, column (a  | a)) held as:  |   |            |               |                   |               |      |  |
|     | Board designated or quasi-endowment   | .0000                   | _%                     |               |   |            |               |                   |               |      |  |
|     | Permanent endowment ► 31.0000   | %                       |                        |               |   |            |               |                   |               |      |  |
| С   | Term endowment ► 69.0000  | %                       |                        |               |   |            |               |                   |               |      |  |
|     | The percentages on lines 2a, 2b, and 2c sho   | •                       |                        |               |   |            |               |                   |               |      |  |
| 3a  | Are there endowment funds not in the posse  | ssion of the organiza   | tion that are held a   | nd administe  | red for t                               | he orgar   | nization      |                   |               |      |  |
|     | by:   |                         |                        |               |   |            |               |                   | Yes           | No   |  |
|     | (i) Unrelated organizations   |                         |                        |               |   |            |               | 3a(i)             |               | X    |  |
|     | (ii) Related organizations  |                         |                        |               |   |            |               |                   |               | Х    |  |
| b   | If "Yes" on line 3a(ii), are the related organiza   | tions listed as require | ed on Schedule R?      |               |   |            |               | 3b                |               |      |  |
| 4   | Describe in Part XIII the intended uses of the  |                         | wment funds.           |               |   |            |               |                   |               |      |  |
| Pai | t VI Land, Buildings, and Equipm  |                         |                        |               |   |            |               |                   |               |      |  |
|     | Complete if the organization answered   | d "Yes" on Form 990     | , Part IV, line 11a. S | See Form 990  | , Part X,                               | , line 10. |               |                   |               |      |  |
|     | Description of property   | (a) Cost or ot          | her (b) Cost           | or other      | (c) A                                   | ccumula    | ted           | (d) Boo           | k value       | 9    |  |
|     |   | basis (investm          | , I                    | ` '           | de                                      | preciatio  | n             |                   |               |      |  |
| 1a  | Land  |                         |                        | 6,902.        |   |            |               | 2,40              | 6,9           | 02.  |  |
|     | Buildings   |                         | 33,16                  | 2,965.        | 28,                                     | 824,       | 773.          | 4,33              | 8,1           | 92.  |  |
|     | Leasehold improvements  |                         |                        |               |   |            |               |                   |               |      |  |
|     | Equipment   |                         | 69                     | 4,003.        |   |            |               | 69                | 4,0           | 03.  |  |
|     | Other   |                         | 4,69                   | 0,495.        |   |            |               | 4,69              |               |      |  |
|     | . Add lines 1a through 1e. (Column (d) must e   |                         | X, column (B), line 1  | 0c.)          |   |            | • 1           | 2,12              | 9,5           | 92.  |  |

Schedule D (Form 990) 2020

| Schedule D (Form 990) 2020 THE RICHARD                               | NIXON FOUN                             | DATION                                    | 52-1278303 Page            |
|--|--|---|----------------------------|
| Part VII Investments - Other Securities.                             |  |   | . agu                      |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, I                | ine 11b. See Form 990. Part X. line 12.   |                            |
| (a) Description of security or category (including name of security) | (b) Book value                         | (c) Method of valuation: Cost o           | r end-of-year market value |
| (1) Financial derivatives  |  |   | ·                          |
| (2) Closely held equity interests                                    |  |   |                            |
| (3) Other  |  |   |                            |
| (A) ALTERNATIVES   | 11,673,54                              | 3. END-OF-YEAR MARK                       | ET VALUE                   |
| (B)  |  |   |                            |
| (C)  |  |   |                            |
| (D)  |  |   |                            |
| (E)  |  |   |                            |
| (F)  |  |   |                            |
| (G)  |  |   |                            |
| (H)  |  |   |                            |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)     | 11,673,54                              | 3.  |                            |
| Part VIII Investments - Program Related.                             |  |   |                            |
| Complete if the organization answered "Yes"                          |  |   |                            |
| (a) Description of investment  | (b) Book value                         | (c) Method of valuation: Cost o           | r end-of-year market value |
| <u>(1)</u>   |  |   |                            |
| (2)  |  |   |                            |
| (3)  |  |   |                            |
| (4)  |  |   |                            |
| (5)  |  |   |                            |
| (6)  |  |   |                            |
| (7)  |  |   |                            |
| (8)  |  |   |                            |
| (9)  |  |   |                            |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)     |  |   |                            |
| Part IX Other Assets.  | 5 000 B 1 11/1                         | " 44 LO E 000 B LV " 45                   |                            |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, I<br>Description | ine 11d. See Form 990, Part X, line 15.   | (b) Book value             |
|  | Description                            |   | (b) Book value             |
| <u>(1)</u>   |  |   |                            |
| (2)  |  |   |                            |
| (3)  |  |   |                            |
| (4)  |  |   |                            |
| (5)<br>(6)   |  |   |                            |
| (7)  |  |   |                            |
| (8)  |  |   |                            |
| (9)  |  |   |                            |
| Total. (Column (b) must equal Form 990, Part X, col. (B) line        | e 15 )                                 |   |                            |
| Part X Other Liabilities.  | 0 10./                                 |   | . 🖊                        |
| Complete if the organization answered "Yes"                          | on Form 990. Part IV. I                | ine 11e or 11f. See Form 990. Part X. lin | e 25.                      |
| 1. (a) Description of liability                                      |  |   | (b) Book value             |
| (1) Federal income taxes   |  |   | `,                         |
| (2)  |  |   |                            |
| (3)  |  |   |                            |
| (4)  |  |   |                            |
| (5)  |  |   |                            |
| (6)  |  |   |                            |

Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) 2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII... X

Schedule D (Form 990) 2020

(7) (8)

| Sche | dule D (Form 990) 2020 THE RICHARD NIXON FOUNDATION   | N      |                  | 52-  | 1278303 | Page 4 |
|------|---|--------|------------------|------|---------|--------|
| Pai  | t XI Reconciliation of Revenue per Audited Financial Statemer                                 | nts Wi | th Revenue per R | etur | า.      |        |
|      | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.                   |        |                  |      |         |        |
| 1    | Total revenue, gains, and other support per audited financial statements                      |        |                  | 1    | 7,807,  | 655.   |
| 2    | Amounts included on line 1 but not on Form 990, Part VIII, line 12:                           |        |                  |      |         |        |
| а    | Net unrealized gains (losses) on investments  | 2a     | 3,281,335.       |      |         |        |
|      | Donated services and use of facilities  | 2b     |                  |      |         |        |
|      | Recoveries of prior year grants   | 2c     |                  |      |         |        |
|      | Other (Describe in Part XIII.)  | 2d     |                  |      |         |        |
|      | Add lines 2a through 2d   |        |                  | 2e   | 3,281,  | 335    |
| 3    | Subtract line 2e from line 1  |        |                  | 3    | 4,526,  | 320    |
| 4    | Amounts included on Form 990, Part VIII, line 12, but not on line 1:                          |        |                  |      |         |        |
| а    | Investment expenses not included on Form 990, Part VIII, line 7b                              | 4a     | 114,805.         |      |         |        |
| b    | Other (Describe in Part XIII.)  | 4b     | 260,684.         |      |         |        |
| С    | Add lines 4a and 4b   |        |                  | 4c   | 375,    | 489.   |
| 5    | Total revenue. Add lines <b>3</b> and <b>4c.</b> (This must equal Form 990, Part I, line 12.) |        |                  | 5    | 4,901,  | 809.   |
| Pai  | rt XII Reconciliation of Expenses per Audited Financial Stateme                               | ents W | ith Expenses per | Retu | irn.    |        |
|      | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.                   |        |                  |      |         |        |
| 1    | Total expenses and losses per audited financial statements                                    |        |                  | 1    | 6,763,  | 463    |

|   | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.    |    |          |    |            |
|---|--|----|----------|----|------------|
| 1 | Total expenses and losses per audited financial statements                     |    |          | 1  | 6,763,463. |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25:              |    |          |    |            |
| а | Donated services and use of facilities   | 2a |          |    |            |
| b | Prior year adjustments   | 2b |          |    |            |
| С | Other losses   | 2c |          |    |            |
| d | Other (Describe in Part XIII.)   | 2d |          |    |            |
| е | Add lines 2a through 2d  |    |          | 2e | 0.         |
| 3 | Subtract line 2e from line 1   |    |          | 3  | 6,763,463. |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1:             |    |          |    |            |
| а | Investment expenses not included on Form 990, Part VIII, line 7b               | 4a | 114,805. |    |            |
| b | Other (Describe in Part XIII.)   | 4b | 260,684. |    |            |
| С | Add lines 4a and 4b  |    |          | 4c | 375,489.   |
| 5 | Total expenses Add lines 3 and 4c (This must equal Form 990, Part I, line 18.) |    |          | 5  | 7.138.952. |

#### Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

#### PART V, LINE 4:

IN MAY 1998, THE FOUNDATION WAS NAMED AS A PRINCIPAL BENEFICIARY OF THE CHARLES G. REBOZO REVOCABLE TRUST (REBOZO TRUST). ALL FUNDS BEQUEATHED TO THE FOUNDATION FROM THE REBOZO TRUST HAVE BEEN PLACED IN A DESIGNATED ENDOWMENT FUND. BEGINNING IN 2003 AND CONTINUING OVER A FIVE-YEAR PERIOD, 4% OF THE FUND BALANCE AT THE END OF EACH YEAR WAS AUTHORIZED FOR RELEASE DURING THE FOLLOWING YEAR FOR OPERATING EXPENSES.

EVERY THREE YEARS, THE DESIGNATED INDIVIDUALS OF THE REBOZO TRUST (THE "DESIGNATED INDIVIDUALS") CAN VOTE UNANIMOUSLY TO DECIDE ON WHETHER TO ADJUST THE FUTURE DISTRIBUTION PERCENTAGE BUT, IN NO EVENT, CAN THE DESIGNATED INDIVIDUALS MODIFY THE PERCENTAGE TO A FIGURE THAT IS LESS THAN

Schedule D (Form 990) 2020

Part XIII | Supplemental Information (continued)

THE GREATER OF THE MODIFIED PERCENTAGE FOR SUCH A PERIOD, OR 3.0%. IF FOR ANY REASON THERE IS A FAILURE TO FIX A MODIFIED PERCENTAGE, THE PERCENTAGE SHALL BE 3.0%. FOR EACH OF THE YEARS ENDED DECEMBER 31, 2020 AND 2019, THE DISTRIBUTION PERCENTAGE WAS 3% AND 4%, RESPECTIVELY.

#### PART X, LINE 2:

THE FOUNDATION EVALUATES UNCERTAIN TAX POSITIONS WHEREBY THE EFFECT OF THE UNCERTAINTY WOULD BE RECORDED IF THE TAX POSITIONS WILL, MORE LIKELY THAN NOT, BE SUSTAINED UPON EXAMINATION. AS OF DECEMBER 31, 2020, MANAGEMENT DOES NOT BELIEVE THE FOUNDATION HAS ANY UNCERTAIN TAX POSITIONS REQUIRING ACCRUAL OR DISCLOSURE. THE FOUNDATION IS SUBJECT TO POTENTIAL INCOME TAX AUDITS ON OPEN TAX YEARS BY ANY TAXING JURISDICTION IN WHICH IT OPERATES. THE STATUTE OF LIMITATIONS FOR FEDERAL AND CALIFORNIA STATE PURPOSES IS GENERALLY THREE AND FOUR YEARS, RESPECTIVELY.

#### PART XI, LINE 4B - OTHER ADJUSTMENTS:

LECTURES AND SPECIAL EXHIBITS EXPENSE

260,684.

#### PART XII, LINE 4B - OTHER ADJUSTMENTS:

LECTURES AND SPECIAL EXHIBITS EXPENSE

260,684.

#### FORM 990, PART VIII, LINE 1E

IN JANUARY 2021, THE SBA ANNOUNCED A SECOND DRAW OF PAYCHECK PROTECTION

PROGRAM LOANS FOR ELIGIBLE ENTITIES. THE FOUNDATION WAS APPROVED TO

RECEIVE AN ADDITIONAL \$600,000 OF PAYCHECK PROTECTION PROGRAM FUNDS. PER

THE TERMS OF THE LOAN, THE FULL AMOUNT WILL BE FORGIVEN AS LONG AS LOAN

PROCEEDS ARE USED TO COVER PAYROLL COSTS AND OTHER SPECIFIED NON-PAYROLL

COSTS (PROVIDED ANY NON-PAYROLL COSTS DO NOT EXCEED 40% OF THE FORGIVEN

032055 12-01-20

| Part XIII   Supplemental Information (continued)                          |
|---|
| AMOUNT) OVER A 24-WEEK PERIOD AFTER THE LOAN IS MADE; AND EMPLOYEE AND    |
| COMPENSATION LEVELS ARE MAINTAINED. THE FOUNDATION INTENDS TO COMPLY WITH |
| THE ABOVE TERMS IN ORDER TO QUALIFY FOR FULL OR PARTIAL LOAN FORGIVENESS. |
| TO THE EXTENT IT IS NOT FORGIVEN, THE FOUNDATION WOULD BE REQUIRED TO     |
| REPAY THAT PORTION AT AN INTEREST RATE OF 1% OVER A PERIOD OF FIVE YEARS, |
| WITH A FINAL INSTALLMENT ESTIMATED BY JANUARY 2026.                       |
|   |
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|   |

### **SCHEDULE J** (Form 990)

**Compensation Information** 

For certain Officers, Directors, Trustees, Key Employees, and Highest

Compensated Employees

Complete if the organization answered "Yes" on Form 990, Part IV, line 23. ► Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization

Department of the Treasury

Internal Revenue Service

THE RICHARD NIXON FOUNDATION

**Employer identification number** 52-1278303

| Pa | art I Questions Regarding Compensation   |    |     |         |
|----|--|----|-----|---------|
|    |  |    | Yes | No      |
| 1a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, |    |     |         |
|    | Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.             |    |     |         |
|    | First-class or charter travel Housing allowance or residence for personal use  |    |     |         |
|    | Travel for companions Payments for business use of personal residence  |    |     |         |
|    | Tax indemnification and gross-up payments  Health or social club dues or initiation fees                               |    |     |         |
|    | Discretionary spending account  Personal services (such as maid, chauffeur, chef)                                      |    |     |         |
|    |  |    |     |         |
| b  | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or          |    |     |         |
|    | reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain               | 1b | Х   |         |
| 2  | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors,       |    |     | 37      |
|    | trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?                  | 2  |     | Х       |
|    |  |    |     |         |
| 3  | Indicate which, if any, of the following the organization used to establish the compensation of the organization's     |    |     |         |
|    | CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to     |    |     |         |
|    | establish compensation of the CEO/Executive Director, but explain in Part III.   |    |     |         |
|    | X Compensation committee  X Written employment contract  |    |     |         |
|    | Independent compensation consultant  X Compensation survey or study  Approval by the board or compensation committee   |    |     |         |
|    | Approval by the board or compensation committee  |    |     |         |
| 4  | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing           |    |     |         |
| 7  | organization or a related organization:  |    |     |         |
| а  | Receive a severance payment or change-of-control payment?  | 4a |     | х       |
| b  | Participate in or receive payment from a supplemental nonqualified retirement plan?                                    | 4b |     | Х       |
| c  | Participate in or receive payment from an equity-based compensation arrangement?                                       | 4c |     | Х       |
|    | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.          |    |     |         |
|    |  |    |     |         |
|    | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.                               |    |     |         |
| 5  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation      |    |     |         |
|    | contingent on the revenues of:   |    |     |         |
| а  | The organization?  | 5a |     | X       |
| b  | Any related organization?  | 5b |     | Х       |
|    | If "Yes" on line 5a or 5b, describe in Part III.   |    |     |         |
| 6  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation      |    |     |         |
|    | contingent on the net earnings of:   |    |     |         |
| а  | The organization?  | 6a |     | X       |
| b  | Any related organization?  | 6b |     | X       |
|    | If "Yes" on line 6a or 6b, describe in Part III.   |    |     |         |
| 7  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments       |    |     | 37      |
| _  | not described on lines 5 and 6? If "Yes," describe in Part III   | 7  |     | X       |
| 8  | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the        |    |     | 77      |
| _  | initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III            | 8  |     | X       |
| 9  | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in                 |    |     |         |
|    | Regulations section 53.4958-6(c)?  | 9  |     | <u></u> |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2020

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

|                          | (B) Breakdown of | W-2 and/or 1099-MI       | SC compensation                           | (C) Retirement and other deferred         | (D) Nontaxable benefits | (E) Total of columns<br>(B)(i)-(D) | (F) Compensation in column (B) |   |
|--------------------------|------------------|--------------------------|---|---|-------------------------|------------------------------------|--------------------------------|---|
| (A) Name and Title       |                  | (i) Base<br>compensation | (ii) Bonus &<br>incentive<br>compensation | (iii) Other<br>reportable<br>compensation | compensation            | benefits                           | (B)(I)-(U)                     | reported as deferred<br>on prior Form 990 |
| (1) IRENE L KLEPP        | (i)              | 182,742.                 | 0.  | 0.  | 23,417.                 | 0.                                 | 206,159.                       | 0.  |
| CFO (UNTIL 07/15/2020)   | (ii)             | 0.                       | 0.  | 0.  | 0.                      | 0.                                 | 0.                             | 0.  |
| (2) HUGH HEWITT          | (i)              | 145,271.                 | 0.  | 0.  | 11,318.                 | 11,360.                            | 167,949.                       | 0.  |
| PRESIDENT & CEO          | (ii)             | 0.                       | 0.  | 0.  | 0.                      | 0.                                 |                                | 0.  |
| (3) JAMES T. BYRON       | (i)              | 142,498.                 | 5,000.                                    | 0.  | 10,950.                 | 3,719.                             |                                | 0.  |
| EXECUTIVE VICE PRESIDENT | (ii)             | 0.                       | 0.  | 0.  | 0.                      | 0.                                 | 0.                             | 0.  |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |
|                          | (i)              |                          |   |   |                         |                                    |                                |   |
|                          | (ii)             |                          |   |   |                         |                                    |                                |   |

| Part III Supplemental Information  |
|--|
| Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information. |
| PART I, LINE 1A:   |
| THE TRAVEL POLICY FOR THE FOUNDATION PROVIDES FOR BUSINESS OR FIRST CLASS  |
| AIRFARE REIMBURSEMENT FOR THE CHAIRMAN. SPOUSE TRAVEL, ON BEHALF OF THE  |
| CHAIRMAN AND THE PRESIDENT, IS PROVIDED FOR WHEN IT IS IN THE FURTHERANCE  |
| OF THE FOUNDATION'S MISSION.   |
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#### **SCHEDULE M** (Form 990)

**Noncash Contributions** 

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

Name of the organization

► Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Public Inspection

Employer identification number

|     | THE RICHARD                                      | NIXON                         | FOUNDATIO   | N   | 52-1                                    | 278 | 303 |     |
|-----|--|-------------------------------|---|---|---|-----|-----|-----|
| Pa  | rt I Types of Property                           |                               |   |   | •                                       |     |     |     |
|     |  | (a)<br>Check if<br>applicable | (b)<br>Number of<br>contributions or<br>items contributed | (c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d)<br>Method of de<br>noncash contribu |     | _   | :s  |
| 1   | Art - Works of art                               |                               |   |   |   |     |     |     |
| 2   | Art - Historical treasures                       |                               |   |   |   |     |     |     |
| 3   | Art - Fractional interests                       |                               |   |   |   |     |     |     |
| 4   | Books and publications                           |                               |   |   |   |     |     |     |
| 5   | Clothing and household goods                     |                               |   |   |   |     |     |     |
| 6   | Cars and other vehicles                          |                               |   |   |   |     |     |     |
| 7   | Boats and planes                                 |                               |   |   |   |     |     |     |
| 8   | Intellectual property                            |                               |   |   |   |     |     |     |
| 9   | Securities - Publicly traded                     | X                             | 3   | 64,181.   | AVERAGE PRI                             | CE  |     |     |
| 10  | Securities - Closely held stock                  |                               |   |   |   |     |     |     |
| 11  | Securities - Partnership, LLC, or                |                               |   |   |   |     |     |     |
|     | trust interests                                  |                               |   |   |   |     |     |     |
| 12  | Securities - Miscellaneous                       |                               |   |   |   |     |     |     |
| 13  | Qualified conservation contribution -            |                               |   |   |   |     |     |     |
|     | Historic structures                              |                               |   |   |   |     |     |     |
| 14  | Qualified conservation contribution - Other      |                               |   |   |   |     |     |     |
| 15  | Real estate - Residential                        |                               |   |   |   |     |     |     |
| 16  | Real estate - Commercial                         |                               |   |   |   |     |     |     |
| 17  | Real estate - Other                              |                               |   |   |   |     |     |     |
| 18  | Collectibles                                     |                               |   |   |   |     |     |     |
| 19  | Food inventory                                   |                               |   | 450.000   |   |     |     |     |
| 20  | Drugs and medical supplies                       | Х                             | 1   | 150,000.  | FAIR MARKET                             | VA  | LUE |     |
| 21  | Taxidermy  |                               |   |   |   |     |     |     |
| 22  | Historical artifacts                             |                               |   |   |   |     |     |     |
| 23  | Scientific specimens                             |                               |   |   |   |     |     |     |
| 24  | Archeological artifacts                          |                               |   |   |   |     |     |     |
| 25  | Other ()   |                               |   |   |   |     |     |     |
| 26  | Other ()   |                               |   |   |   |     |     |     |
| 27  | Other ()   |                               |   |   |   |     |     |     |
| 28  | Other ()   |                               |   |   |   |     |     |     |
| 29  | Number of Forms 8283 received by the organi      |                               |   |   |   |     |     |     |
|     | for which the organization completed Form 82     | 83, Part V, [                 | Donee Acknowledg  | gement <b>29</b>  |   |     |     |     |
|     |  |                               |   |   |   |     | Yes | No  |
| 30a | During the year, did the organization receive b  | •                             |   |   | -                                       |     |     |     |
|     | must hold for at least three years from the date |                               |   |   |   |     |     | - V |
|     | exempt purposes for the entire holding period    | ?                             |   |   |   | 30a |     | X   |
|     | If "Yes," describe the arrangement in Part II.   |                               | a madeira a Ab  | -f  |   |     | v   |     |
| 31  | Does the organization have a gift acceptance     |                               |   |   | itions?                                 | 31  | X   |     |
| 32a | Does the organization hire or use third parties  |                               | •   |   |   |     | v   |     |
| _   | contributions?                                   |                               |   |   |   | 32a | Х   |     |
|     | If "Yes," describe in Part II.                   |                               |   |   |   |     |     |     |
| 33  | If the organization didn't report an amount in c | column (c) fo                 | or a type of propert                                      | y for which column (a) is che   | cked,                                   |     |     |     |
|     | describe in Part II.                             |                               |   |   |   |     |     |     |

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2020

LHA

| Part   | is       | report | ing in Part I | Informati<br>I, column (b)<br>ditional infor | , the num | ide the infor<br>ber of contr | mation re<br>ibutions, f | quired by<br>the numb | Part I, lines<br>er of items r | 30b, 32b, a<br>received, or a | nd 33, and v<br>a combinatio | vhether the on of both. Al | organization<br>so complete |
|--------|----------|--------|---------------|--|-----------|-------------------------------|--------------------------|-----------------------|--------------------------------|-------------------------------|------------------------------|----------------------------|-----------------------------|
| SCH    | EDUL:    | ΕМ,    | PART          | I, CO  | LUMN      | (B):                          |                          |                       |                                |                               |                              |                            |                             |
| THE    | NUM      | BER    | OF IN         | DIVIDU                                       | ALS W     | HO CON                        | TRIB                     | UTED                  | NONCAS                         | H CONT                        | RIBUTI                       | ONS.                       |                             |
| SCH    | EDUL     | ΞМ,    | LINE          | 32B:   |           |                               |                          |                       |                                |                               |                              |                            |                             |
| THE    | ORG      | ANIZ   | ATION         | HIRES  | THE       | INVEST                        | MENT                     | MANA                  | GEMENT                         | FIRM,                         | BROWN                        | ADVIS                      | ORY                         |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
|        |          |        |               |  |           |                               |                          |                       |                                |                               |                              |                            |                             |
| 032142 | 11-23-20 |        |               |  |           |                               |                          |                       |                                |                               |                              | Schedule M                 | (Form 990) 202              |

2020.06000 THE RICHARD NIXON FOUNDATIO 03340\_\_1

## SCHEDULE O

Internal Revenue Service

(Form 990 or 990-EZ)

Department of the Treasury

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

➤ Attach to Form 990 or 990-EZ.

➤ Go to www.irs.gov/Form990 for the latest information.

2020
Open to Public Inspection

OMB No. 1545-0047

Name of the organization

THE RICHARD NIXON FOUNDATION

Employer identification number 52-1278303

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

AND MUSEUM IN YORBA LINDA, CALIFORNIA. AT THE PRESIDENTIAL LIBRARY AND

MUSEUM IN YORBA LINDA, SPECIAL FREE ADMISSION DAYS, AUTHOR AND LECTURE

SERIES AND LEGACY FORUMS ARE HELD THROUGHOUT THE YEAR TO ENCOURAGE

COMMUNITY INVOLVEMENT.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS: PROGRAMMING INCLUDED FREE, COMMUNITY COMMEMORATIONS AND CELEBRATIONS THAT HAVE BECOME A STAPLE IN THE SOUTHERN CALIFORNIA AREA; ALL PROGRAMMING OF THE RICHARD NIXON FOUNDATION IS INSPIRED BY THE LEGACY OF THE PRESIDENT AND FIRST LADY PAT NIXON, AND RELATES TO ONE OR MORE ASPECTS OF THEIR LIVES IN AND OUT OF GOVERNMENT SERVICE. LEGACY-ADVANCING CONTENT, SUCH AS THE 50TH ANNIVERSARY OF THE CREATION THE ENVIRONMENTAL PROTECTION AGENCY AND PUBLICITY-ORIENTED EVENTS, SUCH AS THE PROGRAMS WITH SECRETARY OF STATE MICHAEL POMPEO AND ADMINISTRATOR OF THE EPA ANDREW WHEELER. VIRTUAL PROGRAMS IN 2020 INCLUDED CELEBRATIONS OF MEMORIAL DAY AND PATRIOT DAY, A DISCUSSION WITH FORMER CALIFORNIA GOVERNOR ARNOLD SCHWARZENEGGER ON THE 50TH ANNIVERSARY OF THE CREATION OF THEENVIRONMENTAL PROTECTION AGENCY, AND NEW VIRTUAL TOURS OF PRESIDENT NIXON'S BOYHOOD HOME AND THE PAT NIXON ROSE GARDENS. FOLLOWING THE OUTBREAK OF THE COVID-19 PANDEMIC, THE RICHARD NIXON FOUNDATION TURNED ITS EVENT SPACE INTO A FIRST RESPONSE CENTER. THE FOUNDATION WORKED WITH LOCAL BLOOD BANKS TO HOST 31 BLOOD DRIVES RESULTING IN  $1.400\,$ DONATED UNITS OF BLOOD THAT COULD POTENTIALLY SAVE 4,200 LIVES. FOLLOWING THE OUTBREAK OF THE COVID-19 PANDEMIC, THE RICHARD NIXON

032211 11-20-20

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) 2020

Name of the organization

**Employer identification number** 

THE RICHARD NIXON FOUNDATION 52-1278303

FOUNDATION WORKED TO ACQUIRE AND DONATE 700,000 FACE MASKS TO LOCAL

FIRST RESPONDERS, SCHOOLS AND SMALL BUSINESSES IN 2020, THE NIXON

FOUNDATION UNVEILED AN ORIGINAL EXHIBIT ENTITLED "THE PRESIDENTS CLUB",

DOCUMENTING THE FRIENDSHIPS AND RIVALRIES BETWEEN SEVERAL OF HISTORY'S

MOST WELL-KNOWN PRESIDENTS. THE NIXON FOUNDATION SPONSORED FREE

ADMISSION DAYS FOR THE PUBLIC ON PRESIDENT NIXON'S BIRTHDAY ON JANUARY

FORM 990, PART VI, SECTION A, LINE 2:

AND PRESIDENTS DAY ON FEBRUARY 17.

BOARD MEMBERS TRICIA NIXON COX AND JULIE NIXON EISENHOWER ARE SISTERS AND DAUGHTERS OF THE FORMER UNITED STATES PRESIDENT RICHARD NIXON. BOARD MEMBER CHRISTOPHER COX IS THE SON OF TRICIA NIXON COX. BOARD MEMBER MELANIE EISENHOWER IS THE DAUGHTER OF JULIE NIXON EISENHOWER.

FORM 990, PART VI, SECTION A, LINE 6:

THE MEMBERS OF THE FOUNDATION ARE THE DAUGHTERS OF FORMER PRESIDENT NIXON:

TRICIA NIXON COX AND JULIE NIXON EISENHOWER. THE OTHER SIX MEMBERS ARE:

JAMES H. CAVANAUGH-CHAIRMAN OF THE BOARD, CHAIRMAN OF EXECUTIVE COMMITTEE

JOHN H. BARR-CHAIRMAN OF THE BUDGET AND FINANCE COMMITTEE, AND TREASURER

OF THE BOARD, HON. EVERETT ALVAREZ, JR.-CHAIRMAN OF THE AUDIT COMMITTEE

LAWRENCE M. HIGBY-CHAIRMAN OF THE COMPENSATION COMMITTEE J. PETER

SIMON-CHAIRMAN OF THE INVESTMENT COMMITTEE JOHN H. CARLEY - CHAIRMAN OF THE

PROGRAM COMMITTEE.

FORM 990, PART VI, SECTION A, LINE 7A:

THE RESPONSIBILITY OF THE MEMBERS AT THE ANNUAL MEMBERS MEETING IS TO ELECT
THE DIRECTORS FOR A ONE YEAR TERM. THERE WERE A TOTAL OF 20 DIRECTORS
ELECTED AT THE 2020 ANNUAL MEETING.

Name of the organization
THE RICHARD NIXON FOUNDATION

Employer identification number
52-1278303

FORM 990, PART VI, SECTION B, LINE 11B:

THE AUDIT COMMITTEE SHALL HAVE THE RESPONSIBILITY FOR REVIEWING THE FORM 990 (INCLUDING ALL PERTINENT SCHEDULES) BEFORE IT IS FILED WITH THE INTERNAL REVENUE SERVICE. A DRAFT OF THE FORM 990 SHOULD BE READY FOR REVIEW BY THE AUDIT COMMITTEE NO LATER THAN ONE MONTH PRIOR TO THE FILING DEADLINE. AFTER THE DRAFT OF THE FORM 990 HAS BEEN PROVIDED TO THE AUDIT COMMITTEE, IT WILL HAVE NO MORE THAN TWO WEEKS TO COMPLETE ITS REVIEW. IN CONDUCTING ITS REVIEW OF THE DRAFT OF THE FORM 990, IT IS PREFERRED THAT THE AUDIT COMMITTEE SHALL CONDUCT A TOP-LEVEL TYPE OF REVIEW. HOWEVER, IF THE AUDIT COMMITTEE DESIRES OR DEEMS IT NECESSARY TO CONDUCT A MORE DETAILED REVIEW OF THE FORM 990, THEN IT SHOULD CONTACT THE PREPARER OF THE FORM 990 TO REQUEST COPIES OF THE RELEVANT DETAILED TAX RETURN WORKPAPERS. ONCE THE AUDIT COMMITTEE HAS COMPLETED ITS INITIAL REVIEW OF THE FORM 990, A MEETING OR CONFERENCE CALL WILL BE SCHEDULED WITH THE PREPARER OF THE FORM 990 (REGARDLESS OF WHETHER THE FORM 990 IS EXTERNALLY OR INTERNALLY PREPARED) TO DISCUSS ANY QUESTIONS, COMMENTS, AND SUGGESTED REVISIONS IDENTIFIED BY THE AUDIT COMMITTEE. THE PREPARER OF THE FORM 990 SHOULD MAKE ANY REVISIONS TO THE FORM 990 AS SOON AS FEASIBLY POSSIBLE TO ENSURE THAT THE FORM 990 IS FILED WITH THE INTERNAL REVENUE SERVICE ON A TIMELY BASIS. ALL OF THE QUESTIONS, COMMENTS, AND SUGGESTED REVISIONS SET FORTH BY THE AUDIT COMMITTEE SHOULD BE DOCUMENTED, ALONG WITH ANY RESPONSES FROM THE PREPARER OF THE FORM 990, IF APPLICABLE. AFTER THE FORM 990 HAS BEEN REVIEWED AND APPROVED BY THE AUDIT COMMITTEE, A

COPY IS DISSEMINATED TO THE FULL BOARD PRIOR TO FILING WITH THE INTERNAL REVENUE SERVICE.

FORM 990, PART VI, SECTION B, LINE 12C:

Name of the organization THE RICHARD NIXON FOUNDATION Employer identification number 52-1278303

MANAGEMENT REGULARLY MONITORS TRANSACTIONS FOR CONFLICT OF INTEREST. THREE
BIDS ARE REQUIRED ON SIGNIFICANT CONTRACTS AND MANGAGEMENT APPROVAL IS
REQUIRED FOR ALL OTHER TRANSACTIONS.

FORM 990, PART VI, SECTION B, LINE 15:

THE ORGANIZATION HAS A WRITTEN POLICY IN PLACE OUTLINING PROCEDURES FOR

EXECUTIVE COMPENSATION REVIEW. THE COMPENSATION COMMITTEE OF THE BOARD

ANNUALLY REVIEWS THE EXECUTIVE COMPENSATION.

FORM 990, PART VI, SECTION C, LINE 18:

THE PUBLIC INSPECTION COPY OF THE FORM 990 AND FORM 990-T, FROM THE

PREVIOUS THREE YEARS (AT MINIMUM), WILL BE AVAILABLE (FOR INSPECTION OR

COPYING) AT THE MAIN OFFICE DURING NORMAL BUSINESS HOURS AT NO CHARGE;

ADDITIONALLY, THESE SAME FORMS 990 AND 990-T WILL ALSO BE POSTED ON THE

WEBSITE AT WWW.NIXONFOUNDATION.ORG, WWW.GUIDESTAR.ORG AND

WWW.CHARITYNAVIGATOR.ORG.

FORM 990, PART VI, SECTION C, LINE 19:

THE FOLLOWING ORGANIZATIONAL DOCUMENTS OF THE ORGANIZATION WILL BE

AVAILABLE FOR PUBLIC INSPECTION: PREVIOUS THREE YEAR TAX RETURNS (FORM 990

AND FORM 990-T) AND IRS CONFIRMATION OF EXEMPT STATUS. ALL OF THE

AFOREMENTIONED ORGANIZATIONAL DOCUMENTS WILL ALSO BE POSTED ON THE WEB

SITE. THE ORGANIZATION WILL USE ITS BEST EFFORTS TO ENSURE THAT THE

DOCUMENTS POSTED ON THE WEBSITE ARE THE MOST UPDATED VERSIONS OF SUCH. THE

PUBLIC INSPECTION COPY OF THE FORM 990 WILL NOT INCLUDE SCHEDULE A EXCESS

CONTRIBUTORS OR THE SCHEDULE B NAMES AND ADDRESSES OF CONTRIBUTORS. THE

ORGANIZATION WILL USE ITS BEST EFFORTS TO ENSURE THAT THE FORMS 990 AND

990-T HELD AT THE MAIN OFFICE AND POSTED ON THE WEBSITE ARE THE MOST

Schedule O (Form 990 or 990-EZ) 2020

| Name of the organization THE RICHARD NIXON FOUNDATION     | Employer identification number 52-1278303 |
|---|---|
| UPDATED VERSIONS OF SUCH. FOR EXAMPLE, IN THE INSTANCE WH | ERE A FORM 990 HAS                        |
| BEEN AMENDED, THE AMENDED VERSION OF THE FORM 990 OR FORM | 990-T SHOULD BE                           |
| THE ONE AVAILABLE FOR PUBLIC INSPECTION. WHEN RESPONDING  | TO A PUBLIC                               |
| INSPECTION REQUEST FOR ANY ORGANIZATIONAL DOCUMENT OR FOR | M 990 (INCLUDING                          |
| FORM 990-T) BY ANYONE, THE ORGANIZATION SHALL FULFILL SUC | H REQUEST IN A                            |
| TIMELY FASHION WITHOUT INQUIRING AS TO THE REASON FOR THE | PUBLIC INSPECTION                         |
| REQUEST. THE ORGANIZATION WAS GRANTED EXEMPT STATUS BY TH | E INTERNAL REVENUE                        |
| SERVICE IN AUGUST 1983. THE FOUNDATION POSTS, ON ITS WEBS | ITE, A LETTER FROM                        |
| THE IRS DATED JUNE 22, 1998 CONFIRMING ITS EXEMPT STATUS  | EFFECTIVE AUGUST                          |
| 1983.   |   |
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## EXTENDED TO NOVEMBER 15, 2021

| Form        | 990-T   | E           | exempt Organization Business Income Tax Retu   | rn [    | OMB No. 1545-0047  |
|-------------|---|-------------|--|---------|--|
|             |   |             | (and proxy tax under section 6033(e))  |         | 0000   |
|             |   | For ca      | lendar year 2020 or other tax year beginning, and ending   |         | 2020   |
| Depart      | ment of the Treasury<br>Il Revenue Service        | <b>•</b>    | ► Go to www.irs.gov/Form990T for instructions and the latest information.  Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c) | (3).    | Open to Public Inspection for 501(c)(3) Organizations Only |
| A           | Check box if address changed.                     |             | Name of organization ( Check box if name changed and see instructions.)  | DEmp    | loyer identification number                                |
| <b>B</b> Ex | cempt under section                               | Print       | THE RICHARD NIXON FOUNDATION   | 5       | 2-1278303  |
| X           | ] 501( <b>c</b> )( <b>3</b> )<br>] 408(e)         | or<br>Type  | Number, street, and room or suite no. If a P.O. box, see instructions.  18001 YORBA LINDA BLVD.  |         | p exemption number instructions)                           |
|             | 408A 530(a)<br>529(a) 529S                        |             | City or town, state or province, country, and ZIP or foreign postal code YORBA LINDA, CA 92886-3949  | F L     | Check box if   |
|             |   | С Во        | ok value of all assets at end of year   60,142,267.  |         | an amended return.   |
| G           | Check organization                                | type 🕨      | X 501(c) corporation 501(c) trust 401(a) trust Other trust   | Applica | ble reinsurance entity                                     |
| H (         | Check if filing only to                           | <b>&gt;</b> | Claim credit from Form 8941 Claim a refund shown on Form 2439  |         |  |
| I (         | Check if a 501(c)(3)                              | organiz     | ration filing a consolidated return with a 501(c)(2) titleholding corporation  |         | <b>&gt;</b>  |
| J           | nter the number of                                | attach      | ed Schedules A (Form 990-T)  |         | 1  |
| K [         | Ouring the tax year,                              | was th      | e corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group?   |         | Yes X No   |
|             |   |             | d identifying number of the parent corporation.  |         |  |
|             |   |             | MAMTA DALAL Telephone number   | 714-    | 993-5075   |
| Pa          | rt I   Total Uni                                  | elate       | d Business Taxable Income  |         |  |
| 1           | Total of unrelated                                | busine      | ss taxable income computed from all unrelated trades or businesses (see  |         | 11 240   |
|             | instructions)                                     |             |  |         | -11,342.   |
| 2           | Reserved  |             |  |         | 11 242   |
| 3           | Add lines 1 and 2                                 |             |  |         | -11,342.   |
| 4           |   |             | (see instructions for limitation rules)  |         | 0.   |
| 5           |   |             | taxable income before net operating losses. Subtract line 4 from line 3  | · —     | -11,342.   |
| 6           |   | •           | ng loss. See instructions  | . 6     | 0.   |
| 7           |   |             | ss taxable income before specific deduction and section 199A deduction.  |         | 11 242   |
|             | Subtract line 6 fro                               |             |  |         | -11,342.   |
| 8           |   |             | rally \$1,000, but see instructions for exceptions)  |         | 1,000.   |
| 9           |   |             | duction. See instructions  |         | 1 000  |
| 10          | Total deductions                                  |             |  | . 10    | 1,000.   |
| 11          |   | ss tax      | able income. Subtract line 10 from line 7. If line 10 is greater than line 7,  | ١       |  |
| Da          | enter zerort II Tax Com                           |             | ion  | . 11    | 0.   |
|             |   |             |  |         | 0.   |
| 1           |   |             | s corporations. Multiply Part I, line 11 by 21% (0.21)   | 1       | •  |
| 2           |   |             | ates. See instructions for tax computation. Income tax on the amount on  |         |  |
| •           | Part I, line 11 from<br><b>Proxy tax.</b> See ins |             | ☐ Tax rate schedule or ☐ Schedule D (Form 1041)  | 2 3     |  |
| 3           | Other tax amounts                                 |             |  | 4       |  |
| 4<br>5      | Alternative minimu                                |             | 0 1 1)   | ·       |  |
| 5<br>6      |   |             | - Whater and One instructions  | ·       |  |
| 6<br>7      | •   |             | h 6 to line 1 or 2, whichever applies  | . 7     | 0.   |
| LHA         |   |             | ion Act Notice, see instructions.  |         | Form <b>990-T</b> (2020)                                   |

| Form 9     | <u>`</u> | ,  |  |              |               |                   |              |  | P        | age <b>2</b> |
|------------|----------|--|--|--------------|---------------|-------------------|--------------|--|----------|--------------|
| Part       | III      | Tax and Payments   |  |              | _             |                   |              |  |          |              |
| 1a         | Forei    | gn tax credit (corporations attach Form 1  | 118; trusts attach Form 1116)  | 18           | 1             |                   |              |  |          |              |
| b          |          |  |  |              | <b>)</b>      |                   |              |  |          |              |
| С          | Gene     | ral business credit. Attach Form 3800 (se  | ee instructions)   | 10           | _             |                   |              |  |          |              |
| d          | Credi    | t for prior year minimum tax (attach Form  | 8801 or 8827)  | 10           | t l           |                   |              |  |          |              |
| е          |          | credits. Add lines 1a through 1d   |  |              |               |                   | 1e           |  |          |              |
| 2          | Subti    | ract line 1e from Part II, line 7  |  |              | <u></u>       |                   | 2            |  |          | 0.           |
| 3          | Othe     | r taxes. Check if from: Form 42  | 255 Form 8611 Form   | m 8697       | LLJ F         | orm 8866          |              |  |          |              |
|            |          | Other (a   | ttach statement)   |              |               |                   | 3            |  |          |              |
| 4          | Total    | tax. Add lines 2 and 3 (see instructions).   | Check if includes tax pre  | eviously     | deferred      | under             |              |  |          | _            |
|            |          |  |  |              |               |                   | 4            |  |          | 0.           |
| 5          |          | net 965 tax liability paid from Form 965-A   |  |              | ,             |                   | 5            |  |          | 0.           |
| 6a         | Paym     | nents: A 2019 overpayment credited to 20   | )20  | 6a           | 1             |                   |              |  |          |              |
| b          | 2020     | estimated tax payments. Check if section   | n 643(g) election applies 🕨 L  | <u>6</u> k   | <u> </u>      |                   |              |  |          |              |
| С          | Tax c    | leposited with Form 8868   |  | 60           | :             |                   |              |  |          |              |
| d          | Forei    | gn organizations: Tax paid or withheld at  | source (see instructions)  | 60           | t l           |                   |              |  |          |              |
| е          |          | up withholding (see instructions)  |  |              | •             |                   | _            |  |          |              |
| f          |          | t for small employer health insurance pre  |  |              | f             |                   | _            |  |          |              |
| g          | Othe     | r credits, adjustments, and payments:  |  |              |               |                   |              |  |          |              |
|            |          |  | Other Total  |              |               |                   |              |  |          |              |
| 7          |          | payments. Add lines 6a through 6g  |  |              |               |                   | _ <u>7</u> _ | <del>                                     </del> |          |              |
| 8          |          | nated tax penalty (see instructions). Checl  |  |              |               |                   | <b>│</b>     | <del> </del>                                     |          |              |
| 9          |          | due. If line 7 is smaller than the total of line   |  |              |               |                   | 9            | <del> </del>                                     |          |              |
| 10         |          | payment. If line 7 is larger than the total of   | _  | erpaid       |               |                   | 10           |  |          |              |
| 11<br>Part |          | the amount of line 10 you want: Credited Statements Regarding Certain  |  | ation (      |               | Refunded   ctions | 11           | <u></u>  |          |              |
|            |          |  |  |              |               |                   | L            |  | V        | N-           |
| 1          |          | y time during the 2020 calendar year, did<br>a financial account (bank, securities, or of                              | · ·  | •            |               |                   | •            | -  | Yes      | No           |
|            |          | EN Form 114, Report of Foreign Bank and  |  | -            |               | •                 |              |  |          |              |
|            | here     |  | Trinancial Accounts. It res, enter   | lile Haili   | e or the it   | neigh count       | у            |  |          | Х            |
| 2          |          | g the tax year, did the organization receiv  | ve a distribution from or was it the di  | rantor of    | f or transf   | feror to a        |              |  |          |              |
| _          |          | gn trust?  | ,  |              | •             | ,                 |              |  |          | X            |
|            |          | es," see instructions for other forms the or   |  |              |               |                   |              |  |          |              |
| 3          |          | the amount of tax-exempt interest receiv   | ,  |              |               | ▶ \$              |              |  |          |              |
| 4a         |          | ne organization change its method of acc   |  |              |               |                   |              |  |          | X            |
| b          |          | is "Yes," has the organization described t   |  |              |               |                   |              |  |          |              |
|            |          | in in Part V   |  |              |               |                   |              |  |          |              |
| Part       | V        | Supplemental Information   |  |              |               |                   |              |  |          |              |
| Provide    | the e    | xplanation required by Part IV, line 4b. Als   | so, provide any other additional infor   | rmation.     | See instr     | uctions.          |              |  |          |              |
|            |          |  |  |              |               |                   |              |  |          |              |
|            |          |  |  |              |               |                   |              |  |          |              |
| ٠.         | U        | nder penalties of perjury, I declare that I have examined<br>orrect, and complete. Declaration of preparer (other than | this return, including accompanying schedules a taxpayer) is based on all information of which p | and statem   | nents, and to | the best of my kr | nowledge     | and belief, it is t                              | true,    |              |
| Sign       |          | ,  |  |              | -             | _                 | May the IF   | RS discuss this                                  | return v | vith         |
| Here       |          | 8:   | PRESI  | DENT         | & CE          |                   |              | er shown below                                   | v (see   | ,            |
|            |          | Signature of officer   | Date Title   |              |               |                   | instruction  | ns)? X Yes                                       | s        | No           |
|            |          | Print/Type preparer's name   | Preparer's signature   | Date         |               | Check             | if PT        | IN   |          |              |
| Paid       |          |  | La   |              | c , a a       | self- employe     |              |  | <i>-</i> |              |
| Prepa      | arer     |  | DONITA M. JOSEPH   | <u></u> 01/1 | 6/23          | 1                 |              | 002866   |          |              |
| Use C      |          | Firm's name WINDES, INC.   |  |              |               | Firm's EIN        | <u> </u>     | 5-3001   | ГТ / '   | 9            |
|            | -        | P.O. BOX 8   |  |              |               |                   | /            |  | 110      | 4            |
|            |          | Firm's address LONG BEACH  | , CA 90801-0087  |              |               | Phone no.         | (562         | 2)435-1  | LL9.     | T            |

Form **990-T** (2020)

## SCHEDULE A (Form 990-T)

## **Unrelated Business Taxable Income From an Unrelated Trade or Business**

OMB No. 1545-0047

2020

Department of the Treasury Internal Revenue Service

► Go to www.irs.gov/Form990T for instructions and the latest information.

Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

Open to Public Inspection for 501(c)(3) Organizations Only

| A 1  | THE RICHARD NIXON FOUNDATION   |        |               |              | 52-1278303 |                     |  |  |
|--|--|--------|---------------|--------------|------------|---------------------|--|--|
| <u>c                                    </u> | Unrelated business activity code (see instructions) ▶ 453220   D Sequence  |        |               |              | ce: 1      | of 1                |  |  |
| <u>E [</u>                                   | Describe the unrelated trade or business ►THE NIXON FO   | UND    | ATION OPERATE | S A MUS      | EUM SI     | ORE                 |  |  |
| Pa   | TI Unrelated Trade or Business Income  |        | (A) Income    | (B) Expens   | ses        | (C) Net             |  |  |
| 1a   | Gross receipts or sales 17,829.  |        |               |              |            |                     |  |  |
| b  | Less returns and allowances <b>c</b> Balance ▶   | 1c     | 17,829.       |              |            |                     |  |  |
| 2  | Cost of goods sold (Part III, line 8)  | 2      | 9,395.        |              |            |                     |  |  |
| 3  | Gross profit. Subtract line 2 from line 1c   | 3      | 8,434.        |              |            | 8,434.              |  |  |
| 4 a  | Capital gain net income (attach Sch D (Form 1041 or Form   |        |               |              |            |                     |  |  |
|  | 1120)) (see instructions)  | 4a     |               |              |            |                     |  |  |
| b  | Net gain (loss) (Form 4797) (attach Form 4797) (see instructions)  | 4b     |               |              |            |                     |  |  |
|  | Capital loss deduction for trusts  |        |               |              |            |                     |  |  |
| 5  | Income (loss) from a partnership or an S corporation (attach statement) Rent income (Part IV) Unrelated debt-financed income (Part V) Interest, annuities, royalties, and rents from a controlled organization (Part VI) |        |               |              |            |                     |  |  |
|  |  | 5      |               |              |            |                     |  |  |
| 6  | statement) 5 Rent income (Part IV) 6   |        |               |              |            |                     |  |  |
| 7  |  | 7      |               |              |            |                     |  |  |
| 8  |  |        |               |              |            |                     |  |  |
|  | · · · · · · · · · · · · · · · · · · ·  | 8      |               |              |            |                     |  |  |
| 9  | Investment income of section 501(c)(7), (9), or (17)   |        |               |              |            |                     |  |  |
| _  | organizations (Part VII)   | 9      |               |              |            |                     |  |  |
| 10   | Exploited exempt activity income (Part VIII)   | 10     |               |              |            |                     |  |  |
| 11   | Advertising income (Part IX)   | 11     |               |              |            |                     |  |  |
| 12   | Other income (see instructions; attach statement) STMT 1 12 2,373.   |        |               |              |            | 2,373.              |  |  |
| 13   | Total. Combine lines 3 through 12  |        | 10,807.       |              |            | 10,807.             |  |  |
| Pa   | † II Deductions Not Taken Elsewhere (See instruct  | ions f |               | luctions) De | ductions   | must be             |  |  |
|  | directly connected with the unrelated business in  | icome  | <del></del>   |              |            |                     |  |  |
| 1  | Compensation of officers, directors, and trustees (Part X)   |        |               |              |            |                     |  |  |
| 2  | Salaries and wages   |        |               |              | . 2        | 9,764.              |  |  |
| 3  | Repairs and maintenance  |        |               |              | . 3        |                     |  |  |
| 4  | Bad debts  |        |               |              | . 4        |                     |  |  |
| 5  | Interest (attach statement) (see instructions)   |        |               |              | . 5        |                     |  |  |
| 6  | Taxes and licenses   |        |               |              | . 6        | 879.                |  |  |
| 7  | Depreciation (attach Form 4562) (see instructions)   |        |               |              |            |                     |  |  |
| 8  | Less depreciation claimed in Part III and elsewhere on return  |        | 8a            |              | 8b         |                     |  |  |
| 9  | Depletion  |        |               |              | . 9        |                     |  |  |
| 10   | Contributions to deferred compensation plans   |        |               |              | 10         | 135.                |  |  |
| 11   | Employee benefit programs  |        |               |              |            | 564.                |  |  |
| 12   | Excess exempt expenses (Part VIII)   |        |               |              |            |                     |  |  |
| 13   | Excess readership costs (Part IX)  |        |               |              |            |                     |  |  |
| 14   | Other deductions (attach statement)  |        | SEE STATE     | MENT 2       | 14         | 10,807.             |  |  |
| 15   |  |        |               |              | 15         | 22,149.             |  |  |
| 16   | Unrelated business income before net operating loss deduction. S   |        |               |              |            |                     |  |  |
|  | column (C)   |        |               |              | 16         | -11,342.            |  |  |
| 17   | Deduction for net operating loss (see instructions)  |        |               |              |            | 0.                  |  |  |
| 18   | Unrelated business taxable income. Subtract line 17 from line 16   |        |               |              |            | -11,342.            |  |  |
|  | For Paperwork Reduction Act Notice, see instructions.  |        |               |              |            | A (Form 990-T) 2020 |  |  |

| Page | 2 |
|------|---|
|      |   |

| Part   | III Cost of Goods Sold Enter m                         | ethod of inventory valuati | on LOWER                 | OF COST OR      | MARKET                    |
|--------|--|----------------------------|--------------------------|-----------------|---------------------------|
| 1      | Inventory at beginning of year                         |                            |                          | 1               | 35,177.                   |
| 2      | Purchases  |                            |                          |                 | 15,527.                   |
| 3      | Cost of labor  |                            |                          |                 | 0.                        |
| 4      | Additional section 263A costs (attach statement)       |                            |                          | 4               | 0.                        |
| 5      | Other costs (attach statement)                         |                            |                          |                 | 0.                        |
| 6      | Total. Add lines 1 through 5                           |                            |                          |                 | 50,704.                   |
| 7      | Inventory at end of year                               |                            |                          |                 | 41,309.                   |
| 8      | Cost of goods sold. Subtract line 7 from line 6. Enter |                            |                          |                 | 9,395.                    |
| 9      | Do the rules of section 263A (with respect to proper   | ty produced or acquired f  | or resale) apply to the  | organization?   | Yes X No                  |
| Part   | IV Rent Income (From Real Property a                   | nd Personal Proper         | ty Leased with F         | Real Property)  |                           |
| 1      | Description of property (property street address, city | y, state, ZIP code). Check | if a dual-use (see inst  | ructions)       |                           |
|        | A <u> </u>   |                            |                          |                 |                           |
|        | В 💹  |                            |                          |                 |                           |
|        | c <u> </u>   |                            |                          |                 |                           |
|        | D 📖  |                            |                          |                 |                           |
|        |  | Α                          | В                        | С               | D                         |
| 2      | Rent received or accrued                               |                            |                          |                 |                           |
| а      | From personal property (if the percentage of           |                            |                          |                 |                           |
|        | rent for personal property is more than 10%            |                            |                          |                 |                           |
|        | but not more than 50%)                                 |                            |                          |                 |                           |
| b      | From real and personal property (if the                |                            |                          |                 |                           |
|        | percentage of rent for personal property exceeds       |                            |                          |                 |                           |
|        | 50% or if the rent is based on profit or income)       |                            |                          |                 |                           |
| С      | Total rents received or accrued by property.           |                            |                          |                 |                           |
|        | Add lines 2a and 2b, columns A through D               |                            |                          |                 |                           |
| •      | Tabal waste was about a second Add the Oa ash was      | A House of D. Foton bons   | and an Dark Librario     | - thurses (A)   | 0.                        |
| 3      | Total rents received or accrued. Add line 2c columns   | s A through D. Enter nere  | and on Part I, line 6, 0 | column (A)      | <u></u>                   |
| 4      | Deductions directly connected with the income          |                            |                          |                 |                           |
| 4      | in lines 2(a) and 2(b) (attach statement)              |                            |                          |                 |                           |
| 5      | Total deductions. Add line 4 columns A through D.      | Enter here and on Part I   | ine 6. column (R)        | _               | 0.                        |
| Part ' |  |                            | те о, остант (В)         |                 |                           |
| 1      | Description of debt-financed property (street addres   | · ,                        | heck if a dual-use (se   | e instructions) |                           |
|        | A  | , , , , ,                  | ,                        | ,               |                           |
|        | В  |                            |                          |                 |                           |
|        | С  |                            |                          |                 |                           |
|        | D  |                            |                          |                 |                           |
|        |  | Α                          | В                        | С               | D                         |
| 2      | Gross income from or allocable to debt-financed        |                            |                          |                 |                           |
|        | property   |                            |                          |                 |                           |
| 3      | Deductions directly connected with or allocable        |                            |                          |                 |                           |
|        | to debt-financed property                              |                            |                          |                 |                           |
| а      | Straight line depreciation (attach statement)          |                            |                          |                 |                           |
| b      | Other deductions (attach statement)                    |                            |                          |                 |                           |
| С      | Total deductions (add lines 3a and 3b,                 |                            |                          |                 |                           |
|        | columns A through D)                                   |                            |                          |                 |                           |
| 4      | Amount of average acquisition debt on or allocable     |                            |                          |                 |                           |
|        | to debt-financed property (attach statement)           |                            |                          |                 |                           |
| 5      | Average adjusted basis of or allocable to debt-        |                            |                          |                 |                           |
|        | financed property (attach statement)                   |                            |                          |                 |                           |
| 6      | Divide line 4 by line 5                                |                            | %                        | %               | %                         |
| 7      | Gross income reportable. Multiply line 2 by line 6     |                            |                          |                 |                           |
| 8      | Total gross income (add line 7, columns A through      | D). Enter here and on Par  | t I, line 7, column (A)  | <b>&gt;</b>     | 0.                        |
|        |  |                            | <del></del>              | т               |                           |
| 9      | Allocable deductions. Multiply line 3c by line 6       |                            |                          |                 |                           |
| 10     | Total allocable deductions. Add line 9, columns A t    |                            |                          |                 | 0.                        |
|        | Total dividends-received deductions included in lin    | ne 10                      |                          |                 | 0.<br>A /Form 000 T) 2020 |

Schedule A (Form 990-T) 2020 Page 3 Part VI Interest, Annuities, Royalties, and Rents from Controlled Organizations (see instructions) **Exempt Controlled Organizations** 5. Part of column 4 1. Name of controlled 2. Employer 3. Net unrelated 4. Total of specified 6. Deductions directly that is included in the organization identification income (loss) payments made connected with controlling organizanumber (see instructions) income in column 5 tion's gross income (1) (2)(3) (4)Nonexempt Controlled Organizations 7. Taxable Income 8. Net unrelated 9. Total of specified 10. Part of column 9 11. Deductions directly that is included in the income (loss) payments made connected with controlling organization's (see instructions) income in column 10 gross income (1) (2)(3) (4)Add columns 5 and 10. Add columns 6 and 11. Enter here and on Part I, Enter here and on Part I, line 8, column (A) line 8, column (B) 0 0. **Totals** Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions) Part VII 1. Description of income 5. Total deductions 2. Amount of 3. Deductions 4. Set-asides and set-asides income directly connected (attach statement) (add cols 3 and 4) (attach statement) (1) (2)(3) (4) Add amounts in Add amounts in column 2. Enter column 5. Enter here and on Part I. here and on Part I, line 9, column (A) line 9, column (B) **Totals** 0 Part VIII Exploited Exempt Activity Income, Other Than Advertising Income (see instructions) Description of exploited activity: Gross unrelated business income from trade or business. Enter here and on Part I, line 10, column (A) 2 2 3 Expenses directly connected with production of unrelated business income. Enter here and on Part I, line 10, column (B) 3 Net income (loss) from unrelated trade or business. Subtract line 3 from line 2. If a gain, complete 4 Gross income from activity that is not unrelated business income 5 5

Expenses attributable to income entered on line 5

Excess exempt expenses. Subtract line 5 from line 6, but do not enter more than the amount on line

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6

4. Enter here and on Part II, line 12

|                            | IX Advertising Income   |                                    |                     |  |                    |
|----------------------------|---|------------------------------------|---------------------|--|--------------------|
| 1                          | Name(s) of periodical(s). Check box if reporting                    | ing two or more periodicals on a   | consolidated bas    | is.  |                    |
|                            | A $\square$   |                                    |                     |  |                    |
|                            | В   |                                    |                     |  |                    |
|                            | c $\square$   |                                    |                     |  | _                  |
|                            | D   |                                    |                     |  |                    |
| Entor                      | amounts for each periodical listed above in the                     | corresponding column               |                     |  |                    |
| LIILEI                     | amounts for each periodical listed above in the                     |                                    | В                   | С  | D                  |
| •                          |   | Α                                  | В В                 | <del>                                     </del> | — L                |
| 2                          | Gross advertising income  |                                    |                     |  | 0.                 |
|                            | Add columns A through D. Enter here and or                          | n Part I, line 11, column (A)      |                     | ▶  |                    |
| а                          |   |                                    | ı                   |  |                    |
| 3                          | Direct advertising costs by periodical                              |                                    |                     |  |                    |
| а                          | Add columns A through D. Enter here and or                          | n Part I, line 11, column (B)      |                     | ▶  | 0.                 |
|                            |   |                                    | 1                   |  | 1                  |
| 4                          | Advertising gain (loss). Subtract line 3 from li                    | ine                                |                     |  |                    |
|                            | 2. For any column in line 4 showing a gain,                         |                                    |                     |  |                    |
|                            | complete lines 5 through 8. For any column i                        |                                    |                     |  |                    |
|                            | line 4 showing a loss or zero, do not complet                       |                                    |                     |  |                    |
|                            | lines 5 through 7, and enter zero on line 8 $_{\dots}$              |                                    |                     |  |                    |
| 5                          | Readership costs  |                                    |                     |  |                    |
| 6                          | Circulation income  |                                    |                     |  |                    |
| 7                          | Excess readership costs. If line 6 is less than                     | n                                  |                     |  |                    |
|                            | line 5, subtract line 6 from line 5. If line 5 is le                | ess                                |                     |  |                    |
|                            | than line 6, enter zero   |                                    |                     |  |                    |
| 8                          | Excess readership costs allowed as a                                |                                    |                     |  |                    |
|                            | deduction. For each column showing a gain                           | on                                 |                     |  |                    |
|                            | line 4, enter the lesser of line 4 or line 7                        |                                    |                     |  |                    |
| а                          | Add line 8, columns A through D. Enter the g                        | greater of the line 8a, columns to | tal or zero here ar | nd on  |                    |
|                            | Part II, line 13  |                                    |                     | <b>&gt;</b>                                      | 0.                 |
| Part                       | X Compensation of Officers, Di                                      | irectors, and Trustees (s          | ee instructions)    |  |                    |
|                            |   |                                    |                     | 3. Percentage                                    | 4. Compensation    |
|                            | <b>1.</b> Name  | <b>2.</b> Title                    |                     | of time devoted                                  | attributable to    |
|                            |   |                                    |                     | to business                                      | unrelated business |
|                            |   |                                    |                     | %  |                    |
| (1)                        |   |                                    |                     |  |                    |
| (1)<br>(2)                 |   |                                    |                     | %  |                    |
| (2)                        |   |                                    |                     | %<br>%   |                    |
| (2)<br>(3)                 |   |                                    |                     | <del> </del>                                     |                    |
| (2)                        |   |                                    |                     | %  |                    |
| (2)<br>(3)<br>(4)          | . Enter here and on Part II, line 1                                 |                                    |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total | Enter here and on Part II, line 1  XI Supplemental Information (see | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)          |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |
| (2)<br>(3)<br>(4)<br>Total |   | ee instructions)                   |                     | %  | 0.                 |

| DESCRIPTION   | AMOUNT                   |                      |
|---|--------------------------|----------------------|
| FACILITIES REFUND   | 2,37                     | 3.                   |
| TOTAL TO SCHEDULE A, PART I, LINE 12  | 2,37                     | 3.                   |
| FORM 990-T (A) OTHER DEDUCTIONS   | STATEMENT                | 2                    |
| DESCRIPTION   | AMOUNT                   |                      |
| EVENT EXPENSE OUTSIDE SERVICES MISCELLANEOUS LEGAL FEES SUPPLIES COMPUTER EQUIPMENT POSTAGE & FREIGHT LICENSES DUES & SUBSCRIPTIONS ADVERTISING CREDIT CARD PROCESSING FEES OTHER EXPENSES ACCOUNTING TOTAL TO SCHEDULE A, PART II, LINE 14 | 45<br>86<br>3<br>13<br>8 | 8.3.7.0.3.1.8.4.9.0. |

THE NIXON FOUNDATION OPERATES A MUSEUM STORE OFFERING R

TO FORM 990-T, SCHEDULE A, LINE E