

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Form **990**

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

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.

2024

Open to Public
Inspection

A For the **2024** calendar year, or tax year beginning **SEP 1, 2024** and ending **AUG 31, 2025**

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending	C Name of organization NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION, INC. Doing business as _____ Number and street (or P.O. box if mail is not delivered to street address) Room/suite 1205 N. RAMPART STREET City or town, state or province, country, and ZIP or foreign postal code NEW ORLEANS, LA 70116 F Name and address of principal officer: SARITA M. CARRIERE SAME AS C ABOVE	D Employer identification number 72-0692744 E Telephone number (504) 558-6100 G Gross receipts \$ 72,317,946. H(a) Is this a group return for subordinates? ☐ Yes ☒ No H(b) Are all subordinates included? ☐ Yes ☐ No If "No," attach a list. See instructions H(c) Group exemption number _____
I Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527		
J Website: WWW.JAZZANDHERITAGE.ORG		
K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other L Year of formation: 1970 M State of legal domicile: LA		

Part I Summary

1	Briefly describe the organization's mission or most significant activities: TO PROMOTE NEW ORLEANS JAZZ AND HERITAGE ARTS, MUSIC AND CULTURE.		
2	Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.		
3	Number of voting members of the governing body (Part VI, line 1a)	3	24
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	24
5	Total number of individuals employed in calendar year 2024 (Part V, line 2a)	5	1043
6	Total number of volunteers (estimate if necessary)	6	1215
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.
8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
9	Program service revenue (Part VIII, line 2g)	1,411,452.	1,546,524.
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	71,607,638.	56,241,784.
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	704,273.	3,893,626.
12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	22,232.	205,131.
13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	73,745,595.	61,887,065.
14	Benefits paid to or for members (Part IX, column (A), line 4)	2,528,111.	3,060,697.
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	0.	0.
16a	Professional fundraising fees (Part IX, column (A), line 11e)	9,404,026.	9,061,398.
b	Total fundraising expenses (Part IX, column (D), line 25)	0.	0.
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	339,979.	57,144,414.
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	57,144,414.	50,028,351.
19	Revenue less expenses. Subtract line 18 from line 12	69,076,551.	62,150,446.
20	Total assets (Part X, line 16)	4,669,044.	-263,381.
21	Total liabilities (Part X, line 26)	Beginning of Current Year	End of Year
22	Net assets or fund balances. Subtract line 21 from line 20	54,826,243.	57,307,875.
		4,094,812.	6,216,025.
		50,731,431.	51,091,850.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer SARITA M. CARRIERE, INTERIM EXECUTIVE DIRECTOR	Date		
Paid Preparer Use Only	Preparer's name SHARON CASSIERE	Preparer's signature SHARON CASSIERE	Date	Check if self-employed ☐ PTIN P00543368
	Firm's name EAG GULF COAST LLC	Firm's EIN 92-3320348		
	Firm's address ONE GALLERIA BLVD. SUITE 2100 METAIRIE, LA 70001	Phone no. 504-837-5990		

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

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AND FOUNDATION, INC.

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Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

TO PROMOTE, PRESERVE, AND ENCOURAGE THE MUSIC, CULTURE, AND HERITAGE
OF COMMUNITIES IN LOUISIANA THROUGH FESTIVALS, PROGRAMS, AND OTHER
CULTURAL, EDUCATIONAL, AND ECONOMIC ACTIVITIES.

2 Did the organization undertake any significant program services during the year which were not listed on the
prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.
Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and
revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 55,530,365. including grants of \$ 500,000.) (Revenue \$ 56,439,905.)

CULTURAL ENRICHMENT: THE NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND
FOUNDATION, INC. HAS SEVERAL ENRICHMENT PROGRAMS, INCLUDING MULTIPLE
MUSIC FESTIVALS AND CONCERT SERIES HIGHLIGHTING LOCAL CULTURE THROUGH
MUSIC, CUISINE, AND ART. THESE CONCERTS AND FESTIVAL ARTIST
PERFORMANCES ARE ALSO STREAMED FOR BROADER ACCESSIBILITY. THE ESTIMATED
NUMBER OF ATTENDEES AT JAZZ FEST AND OTHER FESTIVAL AND CONCERTS,
STREAMING VIEWERS, AND REMAINING PARTICIPANTS IS 520,000. IN ADDITION,
THE FOUNDATION PROVIDED SUPPORT TO WWOZ, A RELATED ORGANIZATION WHICH
OPERATES A RADIO STATION IN NEW ORLEANS, LA FOR PRODUCTION AND
BROADCASTING OF JAZZ PROGRAMMING.

4b (Code:) (Expenses \$ 2,664,337. including grants of \$ 2,560,697.) (Revenue \$)

ECONOMIC DEVELOPMENT: THE NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND
FOUNDATION, INC. HAS SEVERAL ECONOMIC DEVELOPMENT PROGRAMS BENEFITING
LOCAL MUSICIANS AND CULTURE BEARERS OF THE COMMUNITY. THESE PROGRAMS
INCLUDE THOSE WHICH PROVIDE COMMUNITY GRANTS TO SUPPORT PROJECTS IN
MUSIC AND THE ART INDUSTRY OF LOUISIANA. THERE WERE APPROXIMATELY 2,055
GRANT PARTICIPANTS.

4c (Code:) (Expenses \$ 1,323,959. including grants of \$) (Revenue \$)

EDUCATION: THE NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION,
INC. HAS SEVERAL EDUCATIONAL PROGRAMS, INCLUDING HANDS-ON MUSICAL
INSTRUCTION FOR KIDS AGES 8-17. OTHER PROGRAMS ENGAGE ADULTS AND
CHILDREN IN MEANINGFUL DIALOGUE ABOUT HISTORY, CULTURE, AND BUSINESS.
IN FYE 2025, THERE WERE APPROXIMATELY 547 STUDENTS, TEACHERS, AND
PARTICIPANTS IN SYMPOSIUMS AND INSTRUCTION.

4d Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 59,518,661.

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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)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		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? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	X	
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	X	
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.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
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? <i>If "Yes," complete Schedule D, Part VII</i>		X
c 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? <i>If "Yes," complete Schedule D, Part VIII</i>		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? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
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? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
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? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
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? <i>If "Yes," complete Schedule G, Part I. See instructions</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	

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Part IV Checklist of Required Schedules (continued)

	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? <i>If "Yes," complete Schedule I, Parts I and III</i>	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? <i>If "Yes," complete Schedule J</i>	23 X	
24a 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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c 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	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a 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? <i>If "Yes," complete Schedule L, Part I</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 that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b	X
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? <i>If "Yes," complete Schedule L, Part II</i>	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 entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>	27	X
28 Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>	28a	X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>	28b	X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>	28c	X
29 Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M</i>	29 X	
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30 X	
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>	34 X	
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a X	
b 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)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35b X	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	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? <i>If "Yes," complete Schedule R, Part VI</i>	37	X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?	38 X	

Note: All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a 1175	
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b 0	
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c X	

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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 1043		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a		X
b If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation on Schedule O</i>	3b		
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		X
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 Accounts (FBAR).			
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 transaction?	5b		X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7 Organizations that may receive deductible contributions under section 170(c).			
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	X	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		X
d If "Yes," indicate the number of Forms 8282 filed during the year	7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8		
9 Sponsoring organizations maintaining donor advised funds.			
a Did the sponsoring organization make any taxable distributions under section 4966?	9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b		
10 Section 501(c)(7) organizations. Enter:			
a Initiation fees and capital contributions included on Part VIII, line 12	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:			
a Gross income from members or shareholders	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		
12a 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.			
a Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.	13a		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b		
c Enter the amount of reserves on hand	13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a		X
b If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation on Schedule O</i>	14b		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? <i>If "Yes," see the instructions and file Form 4720, Schedule N.</i>	15		X
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? <i>If "Yes," complete Form 4720, Schedule O.</i>	16		X
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? <i>If "Yes," complete Form 6069.</i>	17		

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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 ☒ **X**

Section A. Governing Body and Management

		Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	1a	24	
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	24	
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3	X	
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6 Did the organization have members or stockholders?	6		X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a The governing body?	8a	X	
b Each committee with authority to act on behalf of the governing body?	8b	X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O	9		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a		X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, 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 body before filing the form?	11a		X
b Describe on Schedule O the process, if any, used by the organization to review this Form 990.			
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X	
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X	
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	X	
13 Did the organization have a written whistleblower policy?	13	X	
14 Did the organization have a written document retention and destruction policy?	14	X	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a The organization's CEO, Executive Director, or top management official	15a	X	
b Other officers or key employees of the organization	15b	X	
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.			
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed **NONE**

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records
SARITA M. CARRIERE - (504) 558-6100
1205 N. RAMPART STREET, NEW ORLEANS, LA 70116

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
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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 the 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, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) 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.
- See the instructions for the order in which to list the persons above.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) DONALD K. MARSHALL EXECUTIVE DIRECTOR (THRU 12/2024)	40.00			X				188,769.	0.	16,364.
(2) SARITA M. CARRIERE DIRECTOR OF FINANCE & HR	40.00			X				169,773.	0.	16,016.
(3) JONATHAN S. SOLARI DIRECTOR OF DEVELOPMENT	40.00				X			135,583.	0.	13,477.
(4) LAKIA ROBINSON DIRECTOR OF MKTG, PROGRAMS & COMMS	40.00				X			120,333.	0.	10,435.
(5) JARROD REMETICH ACCOUNTANT	40.00				X			112,018.	0.	10,519.
(6) RACHEL LYONS ARCHIVIST	40.00				X			106,179.	0.	14,200.
(7) SHANNA E. HUDSON-STOWE DEVELOPMENT ASSOCIATE	40.00				X			105,354.	0.	13,913.
(8) CANDICE BATES ANDERSON DIRECTOR	4.00	X						12,000.	0.	0.
(9) DAVID TORKANOWSKY DIRECTOR (THRU 09/2024)	4.00	X						12,000.	0.	0.
(10) GERALD BILLES DIRECTOR	3.00	X						12,000.	0.	0.
(11) JULIE WISE ORECK DIRECTOR	4.00	X						12,000.	0.	0.
(12) CECIL C.J. BLACHE DIRECTOR	5.00	X						11,995.	0.	0.
(13) RACHEL F. COUSIN PRESIDENT	5.00	X		X				11,985.	0.	0.
(14) SKIPPER BOND DIRECTOR	5.00 1.00	X						11,977.	0.	0.
(15) VIRGINIA MILLER DIRECTOR	6.00	X						11,955.	0.	0.
(16) DEBORAH D. HARKINS DIRECTOR	4.00 1.00	X						11,950.	0.	0.
(17) J.R. PEGUES 2ND VICE PRESIDENT	9.00	X		X				11,950.	0.	0.

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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) KAREN SOLOMON DIRECTOR	4.00	X						11,950.	0.	0.
(19) BRITTANY MAJOR DIRECTOR	4.00 4.00	X						11,904.	0.	0.
(20) CARYN RODGERS-BATTISTE DIRECTOR	4.00	X						11,852.	0.	0.
(21) JUDGE SIDNEY H. CATES, IV 1ST VICE PRESIDENT	8.00 2.00	X		X				11,817.	0.	0.
(22) RONALD MCCLAIN DIRECTOR	4.00 4.00	X						11,800.	0.	0.
(23) COURTNEY SLATTEN KATZENSTEIN DIRECTOR	5.00 6.00	X						11,750.	0.	0.
(24) DAVID KERSTEIN DIRECTOR	2.00 5.00	X						11,705.	0.	0.
(25) RICHARD F. CORTIZAS DIRECTOR	6.00 1.00	X						11,295.	0.	0.
(26) ELLEN M. LEE SECRETARY/TREASURER	8.00	X		X				11,195.	0.	0.
1b Subtotal								1,163,089.	0.	94,924.
c Total from continuation sheets to Part VII, Section A								52,579.	0.	0.
d Total (add lines 1b and 1c)								1,215,668.	0.	94,924.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 9

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
4 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? <i>If "Yes," complete Schedule J for such individual</i>	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

Section B. Independent Contractors

1 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) Compensation
AEG PRESENTS LLC, 425 W 11TH ST, SUITE 300, LOS ANGELES, CA 90015	PRODUCER FEES	12,214,798.
CAPS UNIVERSAL 2300 EMPIRE AVE, 5TH FL, BURBANK, CA 91504	STAFFING CONTRACT/PAYROLL PRO	7,279,891.
FESTIVAL PRODUCTIONS, INC. - NEW ORLEANS, 365 CANAL ST, SUITE 2250, NEW ORLEANS, LA	PRODUCER FEES	6,215,875.
CS TOURING, INC P.O. BOX 331847, NASHVILLE, TN 27203	ARTIST	1,825,000.
ZENITH TOURING, INC 10510 NORTHUP WAY, #300, KIRKLAND, WA 98033	ARTIST	1,815,000.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 65

SEE PART VII, SECTION A CONTINUATION SHEETS

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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees *(continued)*

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(27) JAY H. BANKS DIRECTOR	5.00	X						10,895.	0.	0.
(28) KATY ROUBION DIRECTOR	4.00	X						9,200.	0.	0.
(29) HOWARD RODGERS, III DIRECTOR	3.00	X						9,085.	0.	0.
(30) TARA CARTER HERNANDEZ PRESIDENT (THRU 09/2024)	4.00 2.00	X		X				7,300.	0.	0.
(31) MONIQUE MORIAL DIRECTOR	5.00	X						6,149.	0.	0.
(32) LEONARD SMITH III DIRECTOR	5.00	X						6,000.	0.	0.
(33) FLOZELL DANIELS, JR. DIRECTOR	5.00 1.00	X						3,950.	0.	0.
(34) BLAKE-ANTHONY A. JOHNSON CEO	40.00			X				0.	0.	0.
Total to Part VII, Section A, line 1c								52,579.		

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
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Part VIII Statement of Revenue

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

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b	122,054.				
	c Fundraising events	1c	222,774.				
	d Related organizations	1d					
	e Government grants (contributions)	1e	170,965.				
	f All other contributions, gifts, grants, and similar amounts not included above ...	1f	1,030,731.				
	g Noncash contributions included in lines 1a-1f	1g	\$ 156,986.				
	h Total. Add lines 1a-1f						
Program Service Revenue	2 a NO JAZZ & HERITAGE FESTIVAL	Business Code	711300	55,999,220.	55999220.		
	b OTHER FESTIVALS REVENUE		711300	233,630.	233,630.		
	c STUDENT PERFORMANCE & SUPPLY FEES		711300	8,934.	8,934.		
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f			56,241,784.			
	Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			975,295.		
4 Income from investment of tax-exempt bond proceeds							
5 Royalties				1,134.			1,134.
6 a Gross rents		6a	(i) Real 37,839.				
b Less: rental expenses ...		6b	0.				
c Rental income or (loss)		6c	37,839.				
d Net rental income or (loss)				37,839.			37,839.
7 a Gross amount from sales of assets other than inventory		7a	(i) Securities 12,856,020.				
b Less: cost or other basis and sales expenses		7b	9,937,689.				
c Gain or (loss)		7c	2,918,331.				
d Net gain or (loss)				2,918,331.			2918331.
8 a Gross income from fundraising events (not including \$ 222,774. of contributions reported on line 1c). See Part IV, line 18		8a	461,229.				
b Less: direct expenses		8b	493,192.				
c Net income or (loss) from fundraising events				-31,963.			-31,963.
9 a Gross income from gaming activities. See Part IV, line 19		9a					
b Less: direct expenses	9b						
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	10a						
b Less: cost of goods sold	10b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue	11 a REFUNDS/REBATES/REIMBURSEMENTS	Business Code	711300	198,121.	198,121.		
	b						
	c						
	d All other revenue						
	e Total. Add lines 11a-11d			198,121.			
	12 Total revenue. See instructions			61,887,065.	56439905.	0.	3900636.

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
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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).

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	2,166,787.	2,166,787.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	893,910.	893,910.		
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, trustees, and key employees	696,100.	215,195.	480,905.	
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	7,138,554.	6,581,663.	361,533.	195,358.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	116,355.	100,342.	9,271.	6,742.
9 Other employee benefits	314,846.	266,815.	30,304.	17,727.
10 Payroll taxes	795,543.	721,905.	59,235.	14,403.
11 Fees for services (nonemployees):				
a Management	4,753,072.	4,753,072.		
b Legal	121,621.	26,450.	95,171.	
c Accounting	40,500.	20,250.	17,750.	2,500.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	1,949,630.	1,421,259.	525,957.	2,414.
12 Advertising and promotion	1,027,852.	1,014,149.	13,225.	478.
13 Office expenses	247,521.	149,720.	62,721.	35,080.
14 Information technology	48,172.	35,864.	12,308.	
15 Royalties	399,098.	399,098.		
16 Occupancy	387,483.	206,041.	180,518.	924.
17 Travel	1,020,320.	944,505.	73,591.	2,224.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	58,747.	11,250.	47,129.	368.
20 Interest	57,076.		57,076.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	697,644.	581,496.	116,148.	
23 Insurance	3,416,283.	3,293,543.	122,740.	
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 O.)				
a TALENT & ARTIST FEES	23,142,812.	23,141,562.		1,250.
b FESTIVAL EXPENSES	12,395,787.	12,357,802.	1,152.	36,833.
c ALL OTHER PROGRAM EXPEN	264,733.	215,983.	25,072.	23,678.
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	62,150,446.	59,518,661.	2,291,806.	339,979.
26 Joint costs. 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)				

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
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Part X Balance Sheet

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

		(A) Beginning of year		(B) End of year	
Assets	1 Cash - non-interest-bearing	6,968,106.	1	4,743,548.	
	2 Savings and temporary cash investments	6,199,666.	2	4,793,346.	
	3 Pledges and grants receivable, net		3		
	4 Accounts receivable, net	502,143.	4	572,465.	
	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		
	7 Notes and loans receivable, net		7		
	8 Inventories for sale or use		8		
	9 Prepaid expenses and deferred charges	314,206.	9	453,162.	
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	15,608,527.			
	b Less: accumulated depreciation	8,327,876.			
	11 Investments - publicly traded securities	5,614,834.	10c	7,280,651.	
	12 Investments - other securities. See Part IV, line 11	34,002,937.	11	38,155,839.	
	13 Investments - program-related. See Part IV, line 11	500,866.	13	502,928.	
	14 Intangible assets		14		
	15 Other assets. See Part IV, line 11	723,485.	15	805,936.	
16 Total assets. Add lines 1 through 15 (must equal line 33)	54,826,243.	16	57,307,875.		
Liabilities	17 Accounts payable and accrued expenses	4,043,512.	17	2,515,057.	
	18 Grants payable		18		
	19 Deferred revenue	51,300.	19	29,743.	
	20 Tax-exempt bond liabilities		20		
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21		
	22 Loans and other 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		22		
	23 Secured mortgages and notes payable to unrelated third parties		23	2,419,825.	
	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.	25	1,251,400.	
	26 Total liabilities. Add lines 17 through 25	4,094,812.	26	6,216,025.	
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here ☒ and complete lines 27, 28, 32, and 33.				
	27 Net assets without donor restrictions	49,699,440.	27	49,934,373.	
	28 Net assets with donor restrictions	1,031,991.	28	1,157,477.	
	Organizations that do not follow FASB ASC 958, check here ☐ and complete lines 29 through 33.				
	29 Capital stock or trust principal, or current funds		29		
	30 Paid-in or capital surplus, or land, building, or equipment fund		30		
	31 Retained earnings, endowment, accumulated income, or other funds		31		
	32 Total net assets or fund balances	50,731,431.	32	51,091,850.	
	33 Total liabilities and net assets/fund balances	54,826,243.	33	57,307,875.	

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Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	61,887,065.
2	Total expenses (must equal Part IX, column (A), line 25)	2	62,150,446.
3	Revenue less expenses. Subtract line 2 from line 1	3	-263,381.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	50,731,431.
5	Net unrealized gains (losses) on investments	5	623,800.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	51,091,850.

Part XII Financial Statements and Reporting

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

	Yes	No
1 Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other		
If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:		
☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		
b Were the organization's financial statements audited by an independent accountant?	X	
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:		
☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.		
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		X
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		

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**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
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Schedule A (Form 990) 2024

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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.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization'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						
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)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						

12 Gross receipts from related activities, etc. (see instructions) 12

13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f))	14	%
15 Public support percentage from 2023 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2024. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ☐		
b 33 1/3% support test - 2023. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ☐		
17a 10% -facts-and-circumstances test - 2024. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐		
b 10% -facts-and-circumstances test - 2023. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐		

Schedule A (Form 990) 2024

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
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Schedule A (Form 990) 2024

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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.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	8178741.	6941708.	954,698.	1411452.	1546524.	19033123.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	246,724.	46550330.	51578399.	71607638.	56241784.	226224875
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5	8425465.	53492038.	52533097.	73019090.	57788308.	245257998
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	139,781.	4362543.	3394441.	3487766.	3404554.	14789085.
b 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		638,652.	192,055.	12,489.	294,986.	1138182.
c Add lines 7a and 7b	139,781.	5001195.	3586496.	3500255.	3699540.	15927267.
8 Public support. (Subtract line 7c from line 6.)						229330731

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
9 Amounts from line 6	8425465.	53492038.	52533097.	73019090.	57788308.	245257998
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	529,512.	736,758.	744,333.	700,450.	1014268.	3725321.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b	529,512.	736,758.	744,333.	700,450.	1014268.	3725321.
11 Net income from unrelated business activities not included on 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 assets (Explain in Part VI.)	12,334.	88,565.	17,039.	31,604.	198,121.	347,663.
13 Total support. (Add lines 9, 10c, 11, and 12.)	8967311.	54317361.	53294469.	73751144.	59000697.	249330982

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f))	15	91.98 %
16 Public support percentage from 2023 Schedule A, Part III, line 15	16	90.90 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2024 (line 10c, column (f), divided by line 13, column (f))	17	1.49 %
18 Investment income percentage from 2023 Schedule A, Part III, line 17	18	1.67 %

19a 33 1/3% support tests - 2024. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☒

b 33 1/3% support tests - 2023. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Schedule A (Form 990) 2024

72-0692744 Page 4

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of 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

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>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.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>		
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)? <i>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.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>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).</i>		
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? <i>If "Yes," provide detail in Part VI.</i>		
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? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
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))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
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)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Schedule A (Form 990) 2024

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Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
b A family member of a person described on line 11a above?		
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI .		
11c		

Section 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 Part VI 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		

Section 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		

Section 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 on 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		

Section 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 year (see instructions).			
a ☐ 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.			
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.			
a 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 on 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.			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI .			
3a			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.			
3b			

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Schedule A (Form 990) 2024

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Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1** ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.**
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (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		

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (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):			
a 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		
e Discount claimed for blockage or other factors <i>(explain in detail in Part VI):</i>			
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		

Section C - Distributable Amount		(A) Prior Year	(B) 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-functionally integrated Type III supporting organization (see instructions).			

Schedule A (Form 990) 2024

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Schedule A (Form 990) 2024

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Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i>)	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 the organization is responsive (<i>provide details in Part VI</i>). See instructions.	8	
9 Distributable amount for 2024 from Section C, line 6	9	
10 Line 8 amount divided by line 9 amount	10	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2024	(iii) Distributable Amount for 2024
1 Distributable amount for 2024 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2024 (reasonable cause required - <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2024			
a From 2019			
b From 2020			
c From 2021			
d From 2022			
e From 2023			
f Total of lines 3a through 3e			
g Applied to under distributions of prior years			
h Applied to 2024 distributable amount			
i Carryover from 2019 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2024 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2024 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2025. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2020			
b Excess from 2021			
c Excess from 2022			
d Excess from 2023			
e Excess from 2024			

Schedule A (Form 990) 2024

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Schedule A (Form 990) 2024

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Part 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.)

SCHEDULE A, PART III, LINE 12, EXPLANATION FOR OTHER INCOME:

SPECIAL EVENTS

2021 AMOUNT: \$ 88,565.

2022 AMOUNT: \$ 16,041.

INSURANCE PROCEEDS

2020 AMOUNT: \$ 12,334.

REFUNDS/REBATES/REIMBURSEMENTS

2022 AMOUNT: \$ 998.

2023 AMOUNT: \$ 31,604.

2024 AMOUNT: \$ 198,121.

**Schedule B
(Form 990)**

(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

**Attach to Form 990, 990-EZ, or 990-PF.
Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

Name of the organization	Employer identification number
NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION, INC.	72-0692744

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, 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; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ 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.

☐ 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, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year \$

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), 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).

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 177,500.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2		\$ 100,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
3		\$ 84,165.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
4		\$ 70,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
5		\$ 56,968.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
6		\$ 50,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7		\$ 48,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
8		\$ 44,226.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
9		\$ 38,580.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
10		\$ 36,847.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
11		\$ 29,100.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
12		\$ 25,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13		\$ 25,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
14		\$ 25,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
15		\$ 24,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
16		\$ 23,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
17		\$ 21,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
18		\$ 21,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
19		\$ 20,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
20		\$ 16,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
21		\$ 15,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
22		\$ 15,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
23		\$ 15,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
24		\$ 15,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
25		\$ 15,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
26		\$ 13,800.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
27		\$ 12,924.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
28		\$ 12,833.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
29		\$ 12,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
30		\$ 12,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
31		\$ 11,600.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
32		\$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
33		\$ 10,000.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
34		\$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
35		\$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
36		\$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
37		\$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
38		\$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
39		\$ 10,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
40		\$ 9,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
41		\$ 8,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
42		\$ 7,500.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
43		\$ 7,500.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
44		\$ 7,200.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
45		\$ 7,158.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
46		\$ 7,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
47		\$ 6,260.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
48		\$ 6,098.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)

Name of organization NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION, INC.	Employer identification number 72-0692744
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Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
49		\$ 6,080.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
50		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
51		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
52		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
53		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
54		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
55		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
56		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
57		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
58		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
59		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
60		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION, INC.	Employer identification number 72-0692744
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Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
61		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
62		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
63		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
64		\$ 6,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
65		\$ 5,700.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
66		\$ 5,408.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
67		\$ 5,055.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
68		\$ 5,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
69		\$ 5,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
70		\$ 5,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
71		\$ 5,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number

72-0692744

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
8	CASES OF CARBONATED BEVERAGES, WATER, POWERADE AND CUPS	\$ 44,226.	05/27/25
27	100 SHARES MORGAN STANLEY STOCK	\$ 12,924.	12/26/24
33	GIFT CERTIFICATE	\$ 10,000.	04/25/25
45	GIFT CERTIFICATE	\$ 7,158.	04/25/25
48	123 SHARES SELECT STR FINANCIAL SELECT SPDR ETF	\$ 6,098.	12/17/24
		\$	

Name of organization

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Employer identification number

72-0692744

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. from 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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

SCHEDULE D

(Form 990)

(Rev. December 2024)

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 **NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Employer identification number
72-0692744

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 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 funds 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 advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No		

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (for example, recreation or education) ☐ Preservation of a historically important land area

☐ Protection of natural habitat ☐ Preservation of a certified historic structure

☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included on line 2a	2c
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

4 Number of states where property subject to conservation easement is located

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance 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 \$ **795,777.**

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 \$

b Assets included in Form 990, Part X \$

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

Schedule D (Form 990) (Rev. 12-2024)

LHA 432051 01-02-25

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Schedule D (Form 990) (Rev. 12-2024) AND FOUNDATION, INC.

72-0692744 Page 2

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

a ☒ Public exhibitiond ☒ Loan or exchange programb ☒ Scholarly researche ☐ Other _____c ☒ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☒ No

Part IV Escrow and Custodial Arrangements Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
1c	
1d	
1e	
1f	

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

Part V Endowment Funds Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	500,866.	510,413.	555,105.	612,858.	622,450.
b Contributions				6,931.	
c Net investment earnings, gains, and losses	10,062.	8,453.	11,858.	28,627.	28,237.
d Grants or scholarships					
e Other expenditures for facilities and programs	8,000.	18,000.	56,550.	93,311.	37,829.
f Administrative expenses					
g End of year balance	502,928.	500,866.	510,413.	555,105.	612,858.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment .0000 %

b Permanent endowment 99.4178 %

c Term endowment .5822 %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations?

(ii) Related organizations?

	Yes	No
3a(i)		X
3a(ii)		X
3b		

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		676,250.		676,250.
b Buildings		13,666,372.	7,263,265.	6,403,107.
c Leasehold improvements				
d Equipment		799,538.	741,236.	58,302.
e Other		466,367.	323,375.	142,992.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				7,280,651.

Schedule D (Form 990) (Rev. 12-2024)

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Schedule D (Form 990) (Rev. 12-2024) AND FOUNDATION, INC.

72-0692744 Page 3

Part VII Investments - Other Securities

Complete if the organization answered "Yes" on Form 990, Part IV, line 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 or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, line 12, col. (B))		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, line 13, col. (B))		

Part IX Other Assets

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 15, col. (B))	

Part X Other Liabilities

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) ADVANCE ON FUTURE FESTIVAL REVENUES	1,251,400.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	1,251,400.

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 ... ☒

Schedule D (Form 990) (Rev. 12-2024)

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Schedule D (Form 990) (Rev. 12-2024) AND FOUNDATION, INC.

72-0692744 Page 4

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

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	10,493,336.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	623,800.	
b	Donated services and use of facilities	2b	662,749.	
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	1,286,549.
3	Subtract line 2e from line 1		3	9,206,787.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b	52,680,278.	
c	Add lines 4a and 4b		4c	52,680,278.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	61,887,065.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements		1	10,132,917.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a	662,749.	
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	662,749.
3	Subtract line 2e from line 1		3	9,470,168.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b	52,680,278.	
c	Add lines 4a and 4b		4c	52,680,278.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	62,150,446.

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 III, LINE 4:

ALL OF THE ARTWORK THAT WAS ACQUIRED IS FROM LOCAL ARTISTS FROM THE SOUTHEAST REGION OF LOUISIANA. THE VARIOUS PIECES IN THE COLLECTION DEPICT THE MUSIC, CULTURE AND HERITAGE OF THE COMMUNITIES IN THE NEW ORLEANS AREA.

PART V, LINE 4:

TO PROMOTE JAZZ CONCERTS AND JAZZ RELATED LECTURE SERIES IN THE COMMUNITY.

PART X, LINE 2:

THE FOUNDATION IS A NON-PROFIT ORGANIZATION THAT IS EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE. IT IS EXEMPT FROM LOUISIANA INCOME TAX UNDER THE SECTION 121(5) OF TITLE 47 OF THE LOUISIANA REVISED STATUTES OF 1950. THE FOUNDATION APPLIES A "MORE-LIKELY-THAN-NOT" RECOGNITION THRESHOLD FOR ALL TAX UNCERTAINTIES. THIS APPROACH ONLY ALLOWS THE RECOGNITION OF THOSE TAX BENEFITS THAT HAVE A GREATER THAN FIFTY PERCENT LIKELIHOOD OF BEING SUSTAINED UPON EXAMINATION BY THE TAXING AUTHORITIES. THE FOUNDATION HAS REVIEWED ITS TAX POSITIONS AND DETERMINED THERE WERE NO OUTSTANDING OR RETROACTIVE TAX POSITIONS WITH LESS THAN A FIFTY PERCENT LIKELIHOOD OF BEING SUSTAINED UPON EXAMINATION BY THE TAXING AUTHORITIES.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

NO JAZZ & HERITAGE FESTIVAL EXPENSES SEPARATELY STATED 52,680,278.

Schedule D (Form 990) (Rev. 12-2024) **AND FOUNDATION, INC.**

Part XIII	Supplemental Information <i>(continued)</i>
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NO JAZZ & HERITAGE FESTIVAL EXPENSES SEPARATELY STATED	52,680,278.
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52,680,278.

SCHEDULE G
(Form 990)

(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities
Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.
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 NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION, INC.
Employer identification number 72-0692744

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- 1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
a Mail solicitations
b Internet and email solicitations
c Phone solicitations
d In-person solicitations
e Solicitation of nongovernment grants
f Solicitation of government grants
g Special fundraising events
2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?
b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

Table with 6 columns: (i) Name and address of individual or entity (fundraiser), (ii) Activity, (iii) Did fundraiser have custody or control of contributions?, (iv) Gross receipts from activity, (v) Amount paid to (or retained by) fundraiser listed in col. (i), (vi) Amount paid to (or retained by) organization. Includes a Total row at the bottom.

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Schedule G (Form 990) (Rev. 12-2024) AND FOUNDATION, INC.

72-0692744 Page 2

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

	(a) Event #1	(b) Event #2	(c) Other events	(d) Total events
	GALA		NONE	(add col. (a) through col. (c))
	(event type)	(event type)	(total number)	
Revenue	1 Gross receipts	684,003.		684,003.
	2 Less: Contributions	222,774.		222,774.
	3 Gross income (line 1 minus line 2)	461,229.		461,229.
Direct Expenses	4 Cash prizes			
	5 Noncash prizes	94,228.		94,228.
	6 Rent/facility costs	24,816.		24,816.
	7 Food and beverages	84,121.		84,121.
	8 Entertainment	79,400.		79,400.
	9 Other direct expenses	210,627.		210,627.
	10 Direct expense summary. Add lines 4 through 9 in column (d)			493,192.
11 Net income summary. Subtract line 10 from line 3, column (d)			-31,963.	

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

	(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue				
1 Gross revenue				
Direct Expenses	2 Cash prizes			
	3 Noncash prizes			
	4 Rent/facility costs			
	5 Other direct expenses			
	6 Volunteer labor	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No
7 Direct expense summary. Add lines 2 through 5 in column (d)				
8 Net gaming income summary. Subtract line 7 from line 1, column (d)				

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: _____

Schedule G (Form 990) (Rev. 12-2024) **AND FOUNDATION, INC.**

11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No

12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

13 Indicate the percentage of gaming activity conducted in:

a	The organization's facility	13a	%
b	An outside facility	13b	%

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Address _____

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization \$ _____ and the amount of gaming revenue retained by the third party \$ _____

c If "Yes," enter the name and address of the third party:

Address _____

16 Gaming manager information:

Gaming manager compensation \$ _____

Description of services provided	Quantity	Unit Price	Total Price

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$

Part IV **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Part IV	Supplemental Information <i>(continued)</i>
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[illegible]

**SCHEDULE I
(Form 990)**

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

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

**NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Employer identification number
72-0692744

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ **Yes** ☐ **No**

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
FRIENDS OF WWOZ P.O. BOX 51810 NEW ORLEANS, LA 70151	58-1702220	501(C)(3)	500,000.	0.			TO PROVIDE ASSISTANCE TO THE ORGANIZATION IN BROADCASTING AND STREAMING THE MUSIC, COMMUNITY PARTNERSHIP
ST. TAMMANY PARISH SCHOOL BOARD 321 N. THEARD ST COVINGTON, LA 70433	72-6001305	GOVERNMENTAL	106,000.	0.			GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND COMMUNITY PARTNERSHIP
NORMAN DIXON 2ND LINE PARADE FUND 365 CANAL ST, SUITE 2250 NEW ORLEANS, LA 70130	51-0482622	501(C)(3)	100,000.	0.			GRANT- TO PROVIDE SECURITY FOR THE NEW ORLEANS COMMUNITY FOR THE
PRESERVATION RESOURCE CENTER 923 TCHOUPITOULAS ST, #3819 NEW ORLEANS, LA 70130	72-0760857	501(C)(3)	100,000.	0.			COMMUNITY PARTNERSHIP GRANT - HOMES AND HERITAGE PROGRAM FUNDING
NATIONAL PERFORMANCE NETWORK 8121 FIG ST NEW ORLEANS, LA 70118	06-1522546	501(C)(3)	53,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO PROVIDE OPPORTUNITIES FOR CAPTURE OF LOUISIANA CULTURE VIA
NEW ORLEANS MUSICIANS ASSISTANCE FUND - P.O. BOX 19144 - NEW ORLEANS, LA 70179	20-8139539	501(C)(3)	50,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO PROVIDE COMPREHENSIVE HEALTH CARE, MENTAL HEALTH, AND

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **37.**

3 Enter total number of other organizations listed in the line 1 table **5.**

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

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

Schedule I (Form 990) (Rev. 12-2024)

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Schedule I (Form 990) **72-0692744** Page 1

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
KIPP NEW ORLEANS, INC. 1055 ST. CHARLES AVE, SUITE 400 NEW ORLEANS, LA 70130	30-8951727	501(C)(3)	47,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
JEFFERSON PARISH SCHOOL BOARD 501 MANHATTAN BLVD HARVEY, LA 70058	72-6000592	GOVERNMENTAL	42,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
ST. BERNARD PARISH SCHOOL BOARD 200 EAST ST. BERNARD HWY CHALMETTE, LA 70043	72-6001195	GOVERNMENTAL	39,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
COLLEGIATE ACADEMIES 2625 THALIA ST NEW ORLEANS, LA 70113	80-0601507	501(C)(3)	26,812.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
FIRST LINE SCHOOLS 300 N. BROAD ST, SUITE 207 NEW ORLEANS, LA 70119	72-1409800	501(C)(3)	15,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
ALGIERS CHARTER SCHOOLS ASSOCIATION - 2916 GENERAL DEGAULLE DR, SUITE 103 - NEW ORLEANS, LA 70114	20-3737902	501(C)(3)	14,100.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
ALLEN PARISH SCHOOL BOARD P.O. DRAWER C OBERLIN, LA 70655	72-6000020	GOVERNMENTAL	11,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
LAFORCHE PARISH SCHOOL BOARD P.O. BOX 879 THIBODEAUX, LA 70302	72-6000636	GOVERNMENTAL	10,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
THE CULTURED VEGAN P.O. BOX 8402 WAUKEGAN, IL 60079	46-3340400		10,000.	0.			CATAPULT FUND - TO ENCOURAGE INNOVATION AND SUSTAINABILITY FOR ENTREPRENEURS THROUGH

Schedule I (Form 990)

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Schedule I (Form 990) **72-0692744** Page 1

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NEW ORLEANS TOURISM AND CULTURAL FUND - 1100 POYDRAS ST, SUITE 2610 - NEW ORLEANS, LA 70163	72-1191970	501(C)(3)	10,000.	0.			COMMUNITY PARTNERSHIP GRANT - SPONSORSHIP
UNITED NEGRO COLLEGE FUND 1100 POYDRAS ST, SUITE 1400 NEW ORLEANS, LA 70163	13-1624241	501(C)(3)	10,000.	0.			COMMUNITY PARTNERSHIP GRANT - SPONSORSHIP
FOUNDATION FOR LOUISIANA 2022 ST. BERNARD AVE, SUITE 122B NEW ORLEANS, LA 70116	20-3399944	501(C)(3)	10,000.	0.			COMMUNITY PARTNERSHIP GRANT - SPONSORSHIP
NEW ORLEANS COMMUNITY SUPPORT FOUNDATION - 919 ST. CHARLES AVE - NEW ORLEANS, LA 70130	20-5037341	501(C)(3)	10,000.	0.			COMMUNITY PARTNERSHIP GRANT - SPONSORSHIP
INSPIRENOLA CHARTER SCHOOLS 4400 GENERAL MEYER BLVD NEW ORLEANS, LA 70131	46-0675150	501(C)(3)	10,000.	0.			CLASS GOT BRASS AWARD
MUSIC AND CULTURAL COALITION OF NEW ORLEANS NONPROFIT CORP. - 2533 COLUMBUS ST, #108 - NEW ORLEANS, LA 70119	46-2889310	501(C)(3)	8,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND
CRESCENT CITY SCHOOLS 2701 LAWRENCE ST NEW ORLEANS, LA 70114	27-2811737	501(C)(3)	8,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND
LOUISIANA PHILHARMONIC ORCHESTRA 2533 COLUMBUS ST, SUITE 202 NEW ORLEANS, LA 70119	72-1189023	501(C)(3)	7,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND
SAVE OUR SOUL COALITION 606 ESPLANADE AVE NEW ORLEANS, LA 70116	92-0535878	501(C)(3)	7,500.	0.			COMMUNITY PARTNERSHIP GRANT - SPONSORSHIP

Schedule I (Form 990)

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Schedule I (Form 990) **72-0692744** Page 1

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PARISH OF EAST BATON ROUGE P.O. BOX 1471 BATON ROUGE, LA 70821	72-6000353	GOVERNMENTAL	7,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
VERSIPEL NEW MUSIC 7722 BELFAST ST NEW ORLEANS, LA 70125	81-3042889	501(C)(3)	7,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
ARTS COUNCIL OF POINTE COUPEE P.O. BOX 669 NEW ROADS, LA 70760	58-2679215	501(C)(3)	7,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
KREWE OF RED BEANS 3300 ROYAL ST NEW ORLEANS, LA 70117	82-0667168	501(C)(3)	7,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
EFFORTS OF GRACE, INC. 1712 ORETHA CASTLE HALEY NEW ORLEANS, LA 70113	72-1266819	501(C)(3)	6,850.	0.			COMMUNITY PARTNERSHIP GRANT - SPONSORSHIP
SCOTTIE BEANS THEATRE PRODUCTIONS 1089 HIGHWAY 35 CHURCH POINT, LA 70525	83-1677506	501(C)(3)	6,700.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
ARCHDIOCESE OF NEW ORLEANS 7887 WALMSLEY AVE NEW ORLEANS, LA 70125	72-0408966	501(C)(3)	6,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND THROUGHOUT LOUISIANA AND
2BROTHERSLOVE, LLC 1043 POLAND AVE NEW ORLEANS, LA 70119	85-2103638		6,500.	0.			CATAPULT FUND - TO ENCOURAGE INNOVATION AND SUSTAINABILITY FOR ENTREPRENEURS THROUGH
ARITZA'S KITCHEN, LLC 911 CHARBONNET ST NEW ORLEANS, LA 70117	93-3870744		6,500.	0.			CATAPULT FUND - TO ENCOURAGE INNOVATION AND SUSTAINABILITY FOR ENTREPRENEURS THROUGH

Schedule I (Form 990)

NEW ORLEANS JAZZ & HERITAGE FESTIVAL

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CHERIE'S CATERING 142 18TH ST NEW ORLEANS, LA 70124	20-3061569		6,500.	0.			CATAPULT FUND - TO ENCOURAGE INNOVATION AND SUSTAINABILITY FOR ENTREPRENEURS THROUGH
GREATER NEW ORLEANS EDUCATIONAL TELEVISION FOUNDATION - 916 NAVARRE AVE - NEW ORLEANS, LA 70124	72-0497926	501(C)(3)	6,500.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND
MAGASIN VIETNAMESE CAF 4226 MAGAZINE ST NEW ORLEANS, LA 70115	84-4633408		6,500.	0.			CATAPULT FUND - TO ENCOURAGE INNOVATION AND SUSTAINABILITY FOR ENTREPRENEURS THROUGH
ILLUMINATING THE YOUTH 14548 DUANE RD NEW ORLEANS, LA 70128	87-2712371	501(C)(3)	6,000.	0.			COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
COMMUNITY PARTNERSHIP GRANT	140	722,191.	0.		
CATAPULT FUND	9	76,000.	0.		
FELLOWSHIP	1	5,000.	0.		
DISCRETIONARY - FUNERAL EXPENSES	37	90,719.	0.		

Part IV

Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:

THE RECIPIENTS OF A GRANT OR ASSISTANCE ARE REQUIRED TO SUBMIT A REPORT OUTLINING HOW FUNDS WERE USED. SHOULD THE RECIPIENT NOT SUBMIT, THEY ARE NO LONGER ELIGIBLE FOR ANY FUTURE FUNDING OR ASSISTANCE UNTIL THAT COMPLIANCE OBLIGATION IS MET.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT: FRIENDS OF WWOZ
(H) PURPOSE OF GRANT OR ASSISTANCE: TO PROVIDE ASSISTANCE TO THE ORGANIZATION IN BROADCASTING AND STREAMING THE MUSIC, CONCERTS, AND FESTIVALS OF LOUISIANA AROUND THE WORLD.

NAME OF ORGANIZATION OR GOVERNMENT: ST. TAMMANY PARISH SCHOOL BOARD
(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: NORMAN DIXON 2ND LINE PARADE FUND

NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Schedule I (Form 990)

72-0692744 Page 2

Part IV Supplemental Information

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT- TO
PROVIDE SECURITY FOR THE NEW ORLEANS COMMUNITY FOR THE BLACK MASKING
INDIANS AND SOCIAL AID & PLEASURE 2ND LINE PARADES.

NAME OF ORGANIZATION OR GOVERNMENT: NATIONAL PERFORMANCE NETWORK

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
PROVIDE OPPORTUNITIES FOR CAPTURE OF LOUISIANA CULTURE VIA MEDIA
DOCUMENTATION

NAME OF ORGANIZATION OR GOVERNMENT: NEW ORLEANS MUSICIANS ASSISTANCE FUND

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
PROVIDE COMPREHENSIVE HEALTH CARE, MENTAL HEALTH, AND SOCIAL SERVICES FOR
MUSICIANS.

NAME OF ORGANIZATION OR GOVERNMENT: KIPP NEW ORLEANS, INC.

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: JEFFERSON PARISH SCHOOL BOARD

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: ST. BERNARD PARISH SCHOOL BOARD

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: COLLEGIATE ACADEMIES

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM, AND CLASS GOT BRASS AWARD.

NAME OF ORGANIZATION OR GOVERNMENT: FIRST LINE SCHOOLS

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: ALGIERS CHARTER SCHOOLS ASSOCIATION

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM, AND CLASS GOT BRASS AWARD.

NAME OF ORGANIZATION OR GOVERNMENT: ALLEN PARISH SCHOOL BOARD

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: LAFOURCHE PARISH SCHOOL BOARD

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO
MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT
THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: THE CULTURED VEGAN

(H) PURPOSE OF GRANT OR ASSISTANCE: CATAPULT FUND - TO ENCOURAGE

Schedule I (Form 990)

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NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Schedule I (Form 990)

72-0692744 Page 2

Part IV Supplemental Information

INNOVATION AND SUSTAINABILITY FOR ENTREPRENEURS THROUGH TRAINING AND INVESTMENT.

NAME OF ORGANIZATION OR GOVERNMENT:

MUSIC AND CULTURAL COALITION OF NEW ORLEANS NONPROFIT CORP.

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: CRESCENT CITY SCHOOLS

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: LOUISIANA PHILHARMONIC ORCHESTRA

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: PARISH OF EAST BATON ROUGE

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: VERSIPEL NEW MUSIC

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: ARTS COUNCIL OF POINTE COUPEE

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: KREWE OF RED BEANS

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: SCOTTIE BEANS THEATRE PRODUCTIONS

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: ARCHDIOCESE OF NEW ORLEANS

(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY PARTNERSHIP GRANT - TO MAKE QUALITY ARTS PROGRAMS ACCESSIBLE THROUGHOUT LOUISIANA AND SUPPORT THE ARTISTS AND NONPROFITS THAT CREATE THEM.

NAME OF ORGANIZATION OR GOVERNMENT: 2BROTHERS1LOVE, LLC

(H) PURPOSE OF GRANT OR ASSISTANCE: CATAPULT FUND - TO ENCOURAGE INNOVATION AND SUSTAINABILITY FOR ENTREPRENEURS THROUGH TRAINING AND INVESTMENT.

NAME OF ORGANIZATION OR GOVERNMENT: ARITZA'S KITCHEN, LLC

(H) PURPOSE OF GRANT OR ASSISTANCE: CATAPULT FUND - TO ENCOURAGE

SCHEDULE J
(Form 990)

(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

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 NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION, INC.	Employer identification number 72-0692744
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Part I Questions Regarding Compensation

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

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

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.

- | | |
|--|---|
| ☐ Compensation committee | ☒ Written employment contract |
| ☐ Independent compensation consultant | ☐ Compensation survey or study |
| ☐ Form 990 of other organizations | ☒ 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 organization or a related organization:

a Receive a severance payment or change-of-control payment?

b Participate in or receive payment from a supplemental nonqualified retirement plan?

c Participate in or receive payment from an equity-based compensation arrangement?

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:

a The organization?

b Any related organization?

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:

a The organization?

b Any related organization?

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 not described on lines 5 and 6? If "Yes," describe in Part III

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
1b		
2		
4a		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7	X	
8		X
9		

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

Schedule J (Form 990) (Rev. 12-2024)

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)-(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.

[illegible]

Part III	Supplemental Information
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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 7:

AT THE END OF EVERY YEAR, EACH STAFF IS EVALUATED ON PERFORMANCE, AND THE INCENTIVE PAY IS AWARDED BASED ON THAT EVALUATION.

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.
Attach to Form 990.

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

OMB No. 1545-0047

2024

Open to Public
Inspection

Name of the organization **NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.**

Employer identification number
72-0692744

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art	X	57	41,104.	FMV
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods	X		2,123.	FMV
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	3	21,162.	FMV
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	X	2	3,000.	FMV
19 Food inventory	X	5	55,036.	FMV
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other (<u>GIFT CARDS/CERT</u>)	X	45	33,301.	FMV
26 Other (<u>JEWELRY</u>)	X	3	624.	FMV
27 Other ()				
28 Other ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions
for which the organization completed Form 8283, Part V, Donee Acknowledgement 29 0

30a During the year, did the organization receive by contribution any property reported on Part I, lines 1 through 28, that it
must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for
exempt purposes for the entire holding period?

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash
contributions?

b If "Yes," describe in Part II.

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked,
describe in Part II.

	Yes	No
30a		X
31	X	
32a		X
33		

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

Schedule M (Form 990) 2024

Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

THE ORGANIZATION IS REPORTING THE NUMBER OF INSTANCES OF CONTRIBUTIONS.

**SCHEDULE O
(Form 990)**

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

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 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	NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND FOUNDATION, INC.	Employer identification number	72-0692744
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FORM 990, PART VI, SECTION A, LINE 3:

ON JANUARY 27, 2005, THE FOUNDATION ENTERED INTO A PRODUCTION MANAGEMENT AND FINANCING AGREEMENT ("THE AGREEMENT") BETWEEN TWO COMPANIES, COLLECTIVELY THE PRODUCERS, TO PRODUCE AND MANAGE THE NEW ORLEANS JAZZ AND HERITAGE FESTIVAL. THE AGREEMENT INCLUDES TWO EXTENSION PERIODS OF FIVE YEARS OR LONGER AS A RESULT OF AN OPTION FOR A SUCCESSIVE ONE-YEAR EXTENSION AS A RESULT OF SPECIALLY CANCELLED FESTIVALS, AS DEFINED IN THE AGREEMENT. THE CURRENT EXPIRATION DATE OF THE AGREEMENT IS AUGUST 31, 2027.

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

THE DIRECTOR OF FINANCE REVIEWS THE IRS FORM 990 FOR ACCURACY AND COMPLETENESS. ONCE APPROVED BY THE DIRECTOR OF FINANCE, THE 990 IS PRESENTED TO THE FINANCE AND EXECUTIVE COMMITTEES FOR FINAL APPROVAL. AFTER APPROVAL BY THE FINANCE AND EXECUTIVE COMMITTEES, THE EXECUTIVE DIRECTOR SIGNS THE IRS FORM 990 FOR FILING. THE IRS FORM 990 IS AVAILABLE TO THE ENTIRE GOVERNING BODY UPON REQUEST.

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

STAFF, PRODUCERS, AND BOARD MEMBERS ARE REQUIRED TO DISCLOSE THE EXISTENCE OF ANY FINANCIAL INTEREST IN ANY TRANSACTION OR ARRANGEMENT OF THE CORPORATION. THERE IS A CONFLICT OF INTEREST COMMITTEE THAT WILL CONVENE A MEETING TO DISCUSS WHETHER THERE IS A CONFLICT OF INTEREST WHEN A MATTER IS PUT BEFORE THEM. STAFF MAKE PERIODIC REVIEWS OF CONTRACTS AND COMPENSATION ARRANGEMENTS TO ENSURE THE ARM'S LENGTH ARRANGEMENT DOES NOT JEOPARDIZE ITS TAX-EXEMPT STATUS.

IF THE COMMITTEE DETERMINES THAT A CONFLICT OF INTEREST EXISTS, THE PRESIDENT OF THE BOARD OF DIRECTORS MAY, IF APPROPRIATE, APPOINT A DISINTERESTED PERSON OR COMMITTEE TO INVESTIGATE ALTERNATIVES TO THE PROPOSED TRANSACTION OR ARRANGEMENT.

AFTER EXERCISING DUE DILIGENCE, THE BOARD OF DIRECTORS SHALL DETERMINE WHETHER THE CORPORATION CAN OBTAIN WITH REASONABLE EFFORTS A TRANSACTION OR ARRANGEMENT THAT IS EQUALLY ADVANTAGEOUS TO THE CORPORATION, OR MORE ADVANTAGEOUS TO THE CORPORATION, THAT WOULD NOT GIVE RISE TO A CONFLICT OF INTEREST.

IF A TRANSACTION OR ARRANGEMENT THAT IS EQUALLY ADVANTAGEOUS TO THE CORPORATION, OR MORE ADVANTAGEOUS TO THE CORPORATION, IS NOT REASONABLY AVAILABLE TO THE CORPORATION UNDER THE CIRCUMSTANCES, THE BOARD SHALL DETERMINE BY A MAJORITY VOTE OF THE DISINTERESTED BOARD MEMBERS WHETHER THE TRANSACTION OR ARRANGEMENT IS IN THE CORPORATIONS' BEST INTEREST, WHETHER IT IS FAIR AND REASONABLE. IN CONFORMITY WITH THE ABOVE DETERMINATION, IT SHALL DECIDE BY MAJORITY VOTE WHETHER TO ENTER INTO THE TRANSACTION OR ARRANGEMENT.

THE MINUTES OF THE BOARD MEETING SHALL CONTAIN A BRIEF STATEMENT OF ANY ALTERNATIVES TO THE PROPOSED TRANSACTION OR ARRANGEMENT CONSIDERED AND A RECORD OF ANY VOTES TAKEN IN CONNECTION WITH THE PROCEEDINGS.

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

THE EXECUTIVE COMMITTEE EVALUATES THE PERFORMANCE OF THE EXECUTIVE

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

Schedule O (Form 990) (Rev. 12-2024)

LHA 432211 01-15-25

Name of the organization NEW ORLEANS JAZZ & HERITAGE FESTIVAL
AND FOUNDATION, INC.

Employer identification number
72-0692744

DIRECTOR. AN INCREASE IS GIVEN BASED ON PERFORMANCE EVALUATION. THE
EXECUTIVE DIRECTOR EVALUATES ALL KEY STAFF AND ASSESSES INCREASES BASED ON
PERFORMANCE EVALUATION AND COST OF LIVING.

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

THE FORM 990 IS AVAILABLE ON THE ORGANIZATION'S WEBSITE. ALL DOCUMENTS ARE
MADE AVAILABLE UPON WRITTEN REQUEST.

FORM 990, PART XII, LINE 2C:

THERE HAVE BEEN NO CHANGES FROM THE PRIOR YEAR IN THE OVERSIGHT OR
SELECTION PROCESSES FOR THE AUDIT THAT THE ORGANIZATION'S COMMITTEE
USES.

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Part III **Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

[illegible]

Part IV **Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

[illegible]

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		X
b Gift, grant, or capital contribution to related organization(s)	X	
c Gift, grant, or capital contribution from related organization(s)		X
d Loans or loan guarantees to or for related organization(s)		X
e Loans or loan guarantees by related organization(s)		X
f Dividends from related organization(s)		
g Sale of assets to related organization(s)		X
h Purchase of assets from related organization(s)		X
i Exchange of assets with related organization(s)		X
j Lease of facilities, equipment, or other assets to related organization(s)		X
k Lease of facilities, equipment, or other assets from related organization(s)		
l Performance of services or membership or fundraising solicitations for related organization(s)		X
m Performance of services or membership or fundraising solicitations by related organization(s)		X
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	X	
o Sharing of paid employees with related organization(s)		X
p Reimbursement paid to related organization(s) for expenses		
q Reimbursement paid by related organization(s) for expenses		X
r Other transfer of cash or property to related organization(s)		X
s Other transfer of cash or property from related organization(s)		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) FRIENDS OF WWOZ, INC.	M	100,000.	CASH
(2) FRIENDS OF WWOZ, INC.	B	500,000.	CASH
(3)			
(4)			
(5)			
(6)			

Part VII

Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

PART II, IDENTIFICATION OF RELATED TAX-EXEMPT ORGANIZATIONS:

NAME OF RELATED ORGANIZATION:

FRIENDS OF WWOZ, INC.

DIRECT CONTROLLING ENTITY: NEW ORLEANS JAZZ & HERITAGE FESTIVAL AND
FOUNDATION, INC.