

Return of Organization Exempt From Income Tax

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

2021

Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

A For the 2021 calendar year, or tax year beginning and ending																															
B Check if applicable: Address change Name change Initial return Final return/terminated Amended return Application pending	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">C Name of organization THE JACKSON LABORATORY</td> <td rowspan="2">D Employer identification number 01-0211513</td> </tr> <tr> <td colspan="2">Doing business as</td> </tr> <tr> <td colspan="2">Number and street (or P.O. box if mail is not delivered to street address) Room/suite</td> <td rowspan="2">E Telephone number 207-288-6000</td> </tr> <tr> <td colspan="2">600 MAIN STREET</td> </tr> <tr> <td colspan="2">City or town, state or province, country, and ZIP or foreign postal code</td> <td rowspan="2">G Gross receipts \$ 649,297,028.</td> </tr> <tr> <td colspan="2">BAR HARBOR, ME 04609</td> </tr> <tr> <td colspan="2">F Name and address of principal officer: LON CARDON 600 MAIN STREET, BAR HARBOR, ME 04609</td> <td>H(a) Is this a group return for subordinates? Yes <input checked="" type="checkbox"/> No</td> </tr> <tr> <td colspan="2">I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527</td> <td>H(b) Are all subordinates included? Yes No If "No," attach a list. See instructions</td> </tr> <tr> <td colspan="2">J Website: ▶ WWW.JAX.ORG</td> <td>H(c) Group exemption number ▶</td> </tr> <tr> <td colspan="2">K Form of organization: <input checked="" type="checkbox"/> Corporation Trust Association Other ▶</td> <td>L Year of formation: 1929</td> </tr> <tr> <td colspan="2"></td> <td>M State of legal domicile: ME</td> </tr> </table>	C Name of organization THE JACKSON LABORATORY		D Employer identification number 01-0211513	Doing business as		Number and street (or P.O. box if mail is not delivered to street address) Room/suite		E Telephone number 207-288-6000	600 MAIN STREET		City or town, state or province, country, and ZIP or foreign postal code		G Gross receipts \$ 649,297,028.	BAR HARBOR, ME 04609		F Name and address of principal officer: LON CARDON 600 MAIN STREET, BAR HARBOR, ME 04609		H(a) Is this a group return for subordinates? Yes <input checked="" type="checkbox"/> No	I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527		H(b) Are all subordinates included? Yes No If "No," attach a list. See instructions	J Website: ▶ WWW.JAX.ORG		H(c) Group exemption number ▶	K Form of organization: <input checked="" type="checkbox"/> Corporation Trust Association Other ▶		L Year of formation: 1929			M State of legal domicile: ME
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Part I Summary

	1 Briefly describe the organization's mission or most significant activities: <u>SEE SCHEDULE O</u>		
Activities & Governance	2 Check this box <input type="checkbox"/> 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	27
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	26
	5 Total number of individuals employed in calendar year 2021 (Part V, line 2a)	5	2983
	6 Total number of volunteers (estimate if necessary)	6	26
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	1,976,394.
	b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	291,792.
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9 Program service revenue (Part VIII, line 2g)	122,912,211.	120,757,756.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	362,474,943.	415,233,744.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	41,966,854.	34,968,069.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	150,028.	1,914,826.
		527,504,036.	572,874,395.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	2,340,034.	2,892,537.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	245,058,305.	266,577,106.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ 4,544,177.		
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	216,160,594.	240,025,612.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	463,558,933.	509,495,255.	
19 Revenue less expenses. Subtract line 18 from line 12	63,945,103.	63,379,140.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21 Total liabilities (Part X, line 26)	1,211,767,628.	1,458,479,631.
	22 Net assets or fund balances. Subtract line 21 from line 20	293,249,010.	448,097,405.
		918,518,618.	1,010,382,226.

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	11/11/2022 Date			
	▶ DOUGLAS ABBOTT, CFO Type or print name and title				
Paid Preparer Use Only	Print/Type preparer's name TARA D'AGOSTINO	Preparer's signature 	Date 11/08/2022	Check if self-employed <input type="checkbox"/>	PTIN P01245482
	Firm's name ▶ KPMG LLP	Firm's EIN ▶ 13-5565207	Phone no. 617-988-1000		
	Firm's address ▶ 60 SOUTH STREET BOSTON, MA 02111				

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

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission: SEE SCHEDULE O

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 [X] No

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

4a (Code:) (Expenses \$ 262,329,267. including grants of \$ 165,454.) (Revenue \$ 414,058,418.) DEVELOP AND PROVIDE GENETIC RESOURCES THE JACKSON LABORATORY (JAX) IS A GLOBAL RESOURCE FOR DEVELOPING, DISTRIBUTING AND ANALYZING INNOVATIVE MODELS OF HUMAN DISEASE. IT OFFERS AN ARRAY OF MODEL CREATION, HUSBANDRY AND DIAGNOSTIC AND ANALYTICAL SERVICES, RANGING FROM CUSTOM BREEDING AND STRAIN PRESERVATION TO DRUG EFFICACY STUDIES AND GENOME SEQUENCING, ALL FOCUSED ON EMPOWERING BASIC SCIENTIFIC RESEARCH AND DRUG DISCOVERY.

JAX MAINTAINS CLOSE TO 13,000 GENETICALLY DISTINCT STRAINS OF RESEARCH MICE. IN 2021, DISTRIBUTED THEM TO RESEARCHERS FROM MORE THAN 2,000 ORGANIZATIONS, IN UPWARDS OF 64 COUNTRIES USED JAX RESEARCH MICE TO SUPPORT EFFORTS TO FIND CURES FOR THE WORLD'S MOST DEVASTATING HUMAN

4b (Code:) (Expenses \$ 158,767,163. including grants of \$ 1,555,310.) (Revenue \$ 835,256.) BIOMEDICAL RESEARCH THE LABORATORY'S RESEARCHERS COMBINE EXPERIENCE IN MAMMALIAN GENETICS AND HUMAN GENOMICS TO SHAPE AN INTEGRATED APPROACH TO PERSONALIZED MEDICINE. SCIENTISTS WORK COLLABORATIVELY AND CROSS-DISCIPLINE, LEVERAGING EXPERTISE IN CANCER, IMMUNOLOGY, NEUROGENETICS, LIFE-CYCLE BIOLOGY, THE MICROBIOME, AND COMPUTATIONAL BIOLOGY.

MORE THAN 400 JAX STAFF MEMBERS HOLD ADVANCED DEGREES AND THE LABORATORY SUPPORTS MORE THAN 65 RESEARCH TEAMS. FACULTY MEMBERS HAVE 324 ACTIVE SPONSORED RESEARCH COLLABORATION AGREEMENTS WITH 245 ACADEMIC RESEARCH AND CLINICAL INSTITUTIONS. MULTIPLE LABORATORY CENTERS COORDINATE EXPERTISE AROUND CRITICAL RESEARCH AREAS. SINCE 1983

4c (Code:) (Expenses \$ 8,785,327. including grants of \$ 1,171,773.) (Revenue \$ 340,070.) EDUCATION AND TRAINING THE LABORATORY OFFERS EDUCATIONAL PROGRAMS FOR SCIENTISTS THROUGHOUT THEIR CAREERS FROM STEM EDUCATION FOR HIGH SCHOOL STUDENTS AND TRAINING FOR SCIENCE AND MATH TEACHERS TO COURSES AND CONFERENCES FOR EXPERIENCED RESEARCHERS DEFINING THE CUTTING EDGE OF GENOMICS INTO THEIR PRACTICES.

FOR MORE INFORMATION ON THE LABORATORY'S PROGRAM SERVICES, PLEASE REFER TO THE JACKSON LABORATORY 2021 ANNUAL REPORT AT HTTPS://WWW.JAX.ORG/ABOUT-US/LEGAL-INFORMATION/FINANCIALS

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$ 1,640,811.)

4e Total program service expenses 429,881,757.

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.</i> See instructions		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	

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>	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>	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>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
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?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
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>		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>		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>		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>		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>		X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>	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>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	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>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		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>		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>	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>	X	
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	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>	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>		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>		X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?	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		
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	

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

Table with columns for question number, question text, and Yes/No columns. Includes questions 2a through 17 regarding employee counts, tax returns, unrelated business income, foreign accounts, prohibited transactions, and charitable contributions.

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

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members of the governing body at the end of the tax year; 1b Enter the number of voting members included on line 1a, above, who are independent; 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?; 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?; 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?; 5 Did the organization become aware during the year of a significant diversion of the organization's assets?; 6 Did the organization have members or stockholders?; 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?; 7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?; 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: a The governing body? b Each committee with authority to act on behalf of the governing body?; 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.

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

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates?; 10b 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?; 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?; 11b 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; 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?; 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done; 13 Did the organization have a written whistleblower policy?; 14 Did the organization have a written document retention and destruction policy?; 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?; 15a The organization's CEO, Executive Director, or top management official; 15b Other officers or key employees of the organization; 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?; 16b 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?

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed AR, CA, CO, CT, FL, GA, IL, MA, ME, MI, MS, NC
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.
[X] Own website [X] Another's website [X] 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
DOUGLAS ABBOTT - 207-288-6045
600 MAIN STREET, BAR HARBOR, ME 04609

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, 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) EDISON T. LIU, MD (UNTIL 11/21) PRESIDENT & CEO	40.00	X		X				1,488,347.	0.	303,294.
(2) AUROBINDO NAIR EXECUTIVE VP & PRESIDENT JMCRS	40.00				X			1,479,984.	0.	96,810.
(3) S. CATHERINE LONGLEY EXECUTIVE VICE PRESIDENT & COO	40.00			X				866,847.	0.	111,515.
(4) KENNETH H. FASMAN SENIOR VICE PRESIDENT RESEARCH	40.00				X			593,048.	0.	127,967.
(5) CHARLES MILLER CEO, THE JACKSON LABORATORY ANITECH	40.00					X		548,909.	90,000.	71,132.
(6) DOUGLAS ABBOTT CHIEF FINANCIAL OFFICER	40.00			X				488,440.	0.	87,749.
(7) NADIA A. ROSENTHAL SCIENTIFIC DIRECTOR	40.00				X			515,344.	0.	30,359.
(8) KATHY VANDEGRIFT (UNTIL 11/21) ASSOC. GM, SITE DIR & PROD	40.00					X		477,438.	0.	54,565.
(9) JENS RUETER MEDICAL DIRECTOR	40.00					X		462,148.	0.	58,841.
(10) CHARLES LEE, MD SCIENTIFIC DIRECTOR, JAX GM	40.00				X			431,762.	0.	60,483.
(11) BARBARA-JEAN BORMANN-KENNEDY VP SCI TRANSLATION/ALLIANCES	40.00					X		460,327.	0.	30,247.
(12) EMILY SCHORER CHIEF HUMAN RESOURCES OFFICER	40.00					X		453,314.	0.	30,196.
(13) DANIEL HOAG GENERAL COUNSEL & SECRETARY	40.00			X				340,224.	0.	17,938.
(14) JOHN RYAN FORMER GENERAL COUNSEL & SECRETARY	0.00 0.00						X	157,599.	0.	1,400.
(15) LON CARDON, PHD, FMEDSCI PRESIDENT & CEO	40.00	X		X				71,385.	0.	9,519.
(16) BERTRAND GARCIA-MORENO, PHD TRUSTEE	2.00	X						0.	0.	0.
(17) CARLA E. BRODLEY, PHD TRUSTEE	2.00	X						0.	0.	0.

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) JOHN LOWRY TRUSTEE	2.00	X						0.	0.	0.
(19) MELISSA C. GUZY TRUSTEE	2.00	X						0.	0.	0.
(20) JOHN C. SCHIMENTI, PHD TRUSTEE	2.00	X						0.	0.	0.
(21) SANDRA WAITE, JD TRUSTEE	2.00	X						0.	0.	0.
(22) ADAORA A. ADIMORA, MD, MPH TRUSTEE	2.00	X						0.	0.	0.
(23) CHARLES E. HEWETT, PHD TRUSTEE	2.00	X						0.	0.	0.
(24) GEOFFREY W. SMITH, JD TRUSTEE	2.00	X						0.	0.	0.
(25) DAVID J. ROUX BOARD CHAIR	5.00	X		X				0.	0.	0.
(26) THOMAS C. BARRY TRUSTEE	2.00	X						0.	0.	0.
1b Subtotal								8,835,116.	90,000.	1,092,015.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								8,835,116.	90,000.	1,092,015.

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 419

	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
BIOTRANS LLC 9 LIDGERWOOD PLACE, MORRISTOWN, NJ 07960	TRANSPORTATION	8,725,873.
ROPES & GRAY 800 BOYLSTON STREET, BOSTON, MA 02199	LEGAL SERVICES	3,603,570.
E L SHEA 23 CHURCH STREET, ELLSWORTH, ME 04605	CONSTRUCTION MGMT	3,366,411.
WHITING TURNER CONTRACTING 300 EAST JOPPA ROAD, BALTIMORE, MD 21286	CONSTRUCTION MGMT	3,125,175.
WRIGHT-RYAN CONSTRUCTION INC 10 DANFORTH STREET, PORTLAND, ME 04101	CONSTRUCTION MGMT	3,030,297.

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 156

SEE PART VII, SECTION A CONTINUATION SHEETS

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) OTIS W. BRAWLEY, MD TRUSTEE	2.00	X						0.	0.	0.
(28) KATHLEEN A. CORBET (UNTIL 8/21) TRUSTEE	2.00	X						0.	0.	0.
(29) TIMOTHY D. DATTELS VICE BOARD CHAIR	2.00	X						0.	0.	0.
(30) JULIE H. DAUM TRUSTEE	2.00	X						0.	0.	0.
(31) STEVEN B. FINK, JD TRUSTEE	2.00	X						0.	0.	0.
(32) JOAN A. STEITZ, PHD TRUSTEE	2.00	X						0.	0.	0.
(33) JEFFREY M. FRIEDMAN, MD, PHD TRUSTEE	2.00	X						0.	0.	0.
(34) JOHN A. GIBBONS, JR. TRUSTEE	2.00	X						0.	0.	0.
(35) NEAL B. MILCH, JD TRUSTEE	2.00	X						0.	0.	0.
(36) GEORGE G. MONTGOMERY TRUSTEE	2.00	X						0.	0.	0.
(37) FRANK MOSS, PHD TRUSTEE	2.00	X						0.	0.	0.
(38) DENNIS J. PAUSTENBACH, PHD TRUSTEE	2.00	X						0.	0.	0.
(39) JENNY E. ROOKE, PHD TRUSTEE	2.00	X						0.	0.	0.
(40) JOSHUA BRODER TRUSTEE	2.00	X						0.	0.	0.
(41) MARY KATE WOLD, JD TRUSTEE	2.00	X						0.	0.	0.
(42) JEAN HOFFMAN TRUSTEE	2.00	X						0.	0.	0.
Total to Part VII, Section A, line 1c										

Part VIII Statement of Revenue

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

			(A)	(B)	(C)	(D)		
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514		
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a						
	b Membership dues	1b						
	c Fundraising events	1c						
	d Related organizations	1d						
	e Government grants (contributions)	1e	101,646,691.					
	f All other contributions, gifts, grants, and similar amounts not included above	1f	19,111,065.					
	g Noncash contributions included in lines 1a-1f	1g	\$ 1,359,121.					
	h Total. Add lines 1a-1f			120,757,756.				
Program Service Revenue	2 a GENETIC RESOURCES	Business Code	541700	362,741,785.	362,371,288.	370,497.		
	b COVID TESTING		541700	51,316,633.	51,316,633.			
	c RESEARCH		541700	835,256.	835,256.			
	d TRAINING & EDUCATION		541700	340,070.	340,070.			
	e							
	f All other program service revenue							
	g Total. Add lines 2a-2f			415,233,744.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			16,038,013.		1,605,897.	14,432,116.	
	4 Income from investment of tax-exempt bond proceeds							
	5 Royalties			95,499.			95,499.	
	6 a Gross rents	6a	(i) Real	178,516.				
			(ii) Personal					
	b Less: rental expenses	6b		0.				
	c Rental income or (loss)	6c		178,516.				
	d Net rental income or (loss)			178,516.			178,516.	
	7 a Gross amount from sales of assets other than inventory	7a	(i) Securities	95,111,189.				
			(ii) Other	241,500.				
	b Less: cost or other basis and sales expenses	7b		76,395,960.	26,673.			
c Gain or (loss)	7c		18,715,229.	214,827.				
d Net gain or (loss)			18,930,056.			18,930,056.		
8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	8a							
b Less: direct expenses	8b							
c Net income or (loss) from fundraising events								
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 LIQUIDTION OF A STOCK	Business Code	900099	924,834.	924,834.			
	b INTERCOMPANY REVENUE		900099	372,192.	372,192.			
	c OTHER REVENUE		900099	343,785.	343,785.			
	d All other revenue							
	e Total. Add lines 11a-11d			1,640,811.				
12 Total revenue. See instructions			572,874,395.	416,504,058.	1,976,394.	33,636,187.		

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 ...	303,852.	303,852.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	2,588,685.	2,588,685.		
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	7,121,017.	2,718,747.	4,402,270.	
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	193,270,136.	163,713,321.	26,957,106.	2,599,709.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	16,471,753.	14,378,249.	1,862,914.	230,590.
9 Other employee benefits	35,843,084.	28,308,755.	7,092,056.	442,273.
10 Payroll taxes	13,871,116.	11,749,805.	1,934,728.	186,583.
11 Fees for services (nonemployees):				
a Management				
b Legal	4,497,832.		4,497,832.	
c Accounting	357,805.		357,805.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	399,879.		399,879.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	22,435,699.	13,471,002.	8,752,356.	212,341.
12 Advertising and promotion	1,557,337.	1,233,813.	316,277.	7,247.
13 Office expenses	1,278,428.	735,755.	492,406.	50,267.
14 Information technology	17,812,117.	13,427,914.	4,281,748.	102,455.
15 Royalties	2,193,776.	2,193,776.		
16 Occupancy	16,491,203.	15,087,639.	1,345,221.	58,343.
17 Travel	2,082,661.	1,078,906.	933,794.	69,961.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
19 Conferences, conventions, and meetings	5,166.	-16,660.	21,684.	142.
20 Interest	7,852,500.	7,489,256.	353,977.	9,267.
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	50,968,126.	47,385,148.	3,143,841.	439,137.
23 Insurance	3,231,834.	3,097,781.	117,398.	16,655.
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 SUPPLIES	95,960,187.	91,921,927.	3,932,579.	105,681.
b OTHER SERVICES	5,037,945.	3,363,730.	1,669,261.	4,954.
c INTERCO SERVICE FEE	4,304,564.	4,304,564.		
d SETTLEMENTS	1,900,000.		1,900,000.	
e All other expenses	1,658,553.	1,345,792.	304,189.	8,572.
25 Total functional expenses. Add lines 1 through 24e	509,495,255.	429,881,757.	75,069,321.	4,544,177.
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)

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	0.	1	0.
	2 Savings and temporary cash investments	174,228,236.	2	277,847,895.
	3 Pledges and grants receivable, net	14,082,968.	3	13,889,936.
	4 Accounts receivable, net	53,708,726.	4	82,948,141.
	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	0.	5	0.
	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)	0.	6	0.
	7 Notes and loans receivable, net	0.	7	0.
	8 Inventories for sale or use	10,457,156.	8	11,892,387.
	9 Prepaid expenses and deferred charges	6,003,604.	9	10,488,945.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 1,030,097,287.		
	b Less: accumulated depreciation	10b 473,064,872.	544,778,988.	10c 557,032,415.
	11 Investments - publicly traded securities	324,775,421.	11	332,258,387.
	12 Investments - other securities. See Part IV, line 11	62,181,099.	12	113,377,340.
	13 Investments - program-related. See Part IV, line 11	0.	13	0.
	14 Intangible assets	0.	14	0.
	15 Other assets. See Part IV, line 11	21,551,430.	15	58,744,185.
16 Total assets. Add lines 1 through 15 (must equal line 33)	1,211,767,628.	16	1,458,479,631.	
Liabilities	17 Accounts payable and accrued expenses	78,999,564.	17	81,419,513.
	18 Grants payable	0.	18	0.
	19 Deferred revenue	7,477,565.	19	14,872,726.
	20 Tax-exempt bond liabilities	199,717,633.	20	345,076,310.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	0.	21	0.
	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	0.	22	0.
	23 Secured mortgages and notes payable to unrelated third parties	0.	23	0.
	24 Unsecured notes and loans payable to unrelated third parties	0.	24	0.
	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	7,054,248.	25	6,728,856.
	26 Total liabilities. Add lines 17 through 25	293,249,010.	26	448,097,405.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	839,169,016.	27	907,368,411.
	28 Net assets with donor restrictions	79,349,602.	28	103,013,815.
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> 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	918,518,618.	32	1,010,382,226.
33 Total liabilities and net assets/fund balances	1,211,767,628.	33	1,458,479,631.	

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	572,874,395.
2	Total expenses (must equal Part IX, column (A), line 25)	2	509,495,255.
3	Revenue less expenses. Subtract line 2 from line 1	3	63,379,140.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	918,518,618.
5	Net unrealized gains (losses) on investments	5	27,932,045.
6	Donated services and use of facilities	6	
7	Investment expenses	7	552,423.
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	1,010,382,226.

Part XII Financial Statements and Reporting

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

- 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?
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?
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?
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 Single Audit Act and OMB Circular A-133?
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a	X	
3b	X	

Form **990** (2021)

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) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	100,092,912.	111,234,633.	131,073,861.	122,912,211.	120,757,756.	586,071,373.
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	100,092,912.	111,234,633.	131,073,861.	122,912,211.	120,757,756.	586,071,373.
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)						35,153,958.
6 Public support. Subtract line 5 from line 4.						550,917,415.

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7 Amounts from line 4	100,092,912.	111,234,633.	131,073,861.	122,912,211.	120,757,756.	586,071,373.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	11,445,012.	18,347,382.	13,604,379.	10,487,014.	16,312,028.	70,195,815.
9 Net income from unrelated business activities, whether or not the business is regularly carried on	222,547.	475,189.	339,977.	479,786.	293,179.	1,810,678.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	310,307.	9,031,603.	344,223.	121,238.	1,640,811.	11,448,182.
11 Total support. Add lines 7 through 10						669,526,048.
12 Gross receipts from related activities, etc. (see instructions)					12	1,639,624,953.

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 2021 (line 6, column (f), divided by line 11, column (f))	14	82.28 %
15 Public support percentage from 2020 Schedule A, Part II, line 14	15	80.38 %

16a 33 1/3% support test - 2021. 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 - 2020. 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 - 2021. 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 - 2020. 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

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

Table with 7 columns: (a) 2017, (b) 2018, (c) 2019, (d) 2020, (e) 2021, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 8 Public support.

Section B. Total Support

Table with 7 columns: (a) 2017, (b) 2018, (c) 2019, (d) 2020, (e) 2021, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources; 10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975; 10c Add lines 10a and 10b; 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.); 13 Total support.

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

Table with 2 columns: Line number, Percentage. Row 15: Public support percentage for 2021 (line 8, column (f), divided by line 13, column (f)) 15 %; Row 16: Public support percentage from 2020 Schedule A, Part III, line 15 16 %

Section D. Computation of Investment Income Percentage

Table with 2 columns: Line number, Percentage. Row 17: Investment income percentage for 2021 (line 10c, column (f), divided by line 13, column (f)) 17 %; Row 18: Investment income percentage from 2020 Schedule A, Part III, line 17 18 %

19a 33 1/3% support tests - 2021. 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 - 2020. 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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

	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>		

Part IV Supporting Organizations (continued)

Table with 3 columns: Question, Yes, No. Row 11: Has the organization accepted a gift or contribution from any of the following persons? Sub-rows 11a, 11b, 11c.

Section B. Type I Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 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? Row 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?

Section C. Type II Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 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)?

Section D. All Type III Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 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? Row 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? Row 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?

Section E. Type III Functionally Integrated Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions). Sub-rows a, b, c. Row 2: Activities Test. Answer lines 2a and 2b below. Sub-rows a, b. Row 3: Parent of Supported Organizations. Answer lines 3a and 3b below. Sub-rows a, b.

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			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	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

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 (<i>describe in Part VI</i>). 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 2021 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-2021	(iii) Distributable Amount for 2021
1 Distributable amount for 2021 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2021 (reasonable cause required - <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2021			
a From 2016			
b From 2017			
c From 2018			
d From 2019			
e From 2020			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2021 distributable amount			
i Carryover from 2016 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2021 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2021 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2021, 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 2021. 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 2022. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2017			
b Excess from 2018			
c Excess from 2019			
d Excess from 2020			
e Excess from 2021			

Schedule A (Form 990) 2021

Schedule B
(Form 990)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

2021

Name of the organization

THE JACKSON LABORATORY

Employer identification number

01-0211513

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 THE JACKSON LABORATORY	Employer identification number 01-0211513
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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
1	<hr/> <hr/> <hr/>	\$ 89,726,949.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	<hr/> <hr/> <hr/>	\$ 5,861,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization THE JACKSON LABORATORY	Employer identification number 01-0211513
--	--

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
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____

Name of organization THE JACKSON LABORATORY	Employer identification number 01-0211513
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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 C
(Form 990)

Political Campaign and Lobbying Activities

OMB No. 1545-0047

2021

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

For Organizations Exempt From Income Tax Under section 501(c) and section 527
 ▶ **Complete if the organization is described below.** ▶ **Attach to Form 990 or Form 990-EZ.**
 ▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

If the organization answered "Yes," on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," on Form 990, Part IV, line 5 (Proxy Tax) (See separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (See separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization <p style="text-align: center;">THE JACKSON LABORATORY</p>	Employer identification number <p style="text-align: center;">01-0211513</p>
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Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political campaign activity expenditures ▶ \$ _____
- 3 Volunteer hours for political campaign activities _____

Part I-B Complete if the organization is exempt under section 501(c)(3).

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$ _____
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$ _____
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? Yes No
- 4a Was a correction made? Yes No
- b If "Yes," describe in Part IV.

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$ _____
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ \$ _____
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ▶ \$ _____
- 4 Did the filing organization file **Form 1120-POL** for this year? Yes No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule C (Form 990) 2021

Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A** Check if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
1a Total lobbying expenditures to influence public opinion (grassroots lobbying)															
b Total lobbying expenditures to influence a legislative body (direct lobbying)															
c Total lobbying expenditures (add lines 1a and 1b)															
d Other exempt purpose expenditures															
e Total exempt purpose expenditures (add lines 1c and 1d)															
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.															
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">If the amount on line 1e, column (a) or (b) is:</th> <th style="text-align: left;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e.	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	Over \$17,000,000	\$1,000,000.			
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e.														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.														
Over \$17,000,000	\$1,000,000.														
g Grassroots nontaxable amount (enter 25% of line 1f)															
h Subtract line 1g from line 1a. If zero or less, enter -0-															
i Subtract line 1f from line 1c. If zero or less, enter -0-															
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?		<input type="checkbox"/> Yes	<input type="checkbox"/> No												

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) Total
2a Lobbying nontaxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?		X	
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? ..	X		
c Media advertisements?		X	
d Mailings to members, legislators, or the public?		X	
e Publications, or published or broadcast statements?		X	
f Grants to other organizations for lobbying purposes?		X	
g Direct contact with legislators, their staffs, government officials, or a legislative body?	X		116,001.
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		X	
i Other activities?		X	
j Total. Add lines 1c through 1i			116,001.
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		X	
b If "Yes," enter the amount of any tax incurred under section 4912			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	1	
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3 Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?	3	

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

1 Dues, assessments and similar amounts from members	1	
2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year	2a	
b Carryover from last year	2b	
c Total	2c	
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5 Taxable amount of lobbying and political expenditures. See instructions	5	

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (See instructions); and Part II-B, line 1. Also, complete this part for any additional information.

FORM 990, SCH. C, PART II-B, LINE 1G

LOBBYING ACTIVITY BY NON-ELECTING 501(C)(3) ORGANIZATION

THE TOTAL LOBBYING EXPENSE FOR THE YEAR ENDED DECEMBER 31, 2021 WAS

\$116,001, WHICH IS AN ALLOCATION OF EMPLOYEE COMPENSATION FOR LOBBYING

ACTIVITIES.

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

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

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

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization THE JACKSON LABORATORY **Employer identification number** 01-0211513

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?		<input type="checkbox"/> Yes <input type="checkbox"/> 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?		<input type="checkbox"/> Yes <input type="checkbox"/> 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 in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, 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?

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 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

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

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2021

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 exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange program
 - e Other _____
- 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 |
|---------------------------------|--------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 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 on 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	386,957,560.	306,403,790.	261,889,680.	167,681,269.	142,754,972.
b Contributions	6,864,818.	32,802,634.	3,045,938.	115,378,127.	4,085,113.
c Net investment earnings, gains, and losses	61,288,861.	55,001,080.	46,408,311.	-16,079,673.	25,071,184.
d Grants or scholarships			166,468.	147,601.	44,189.
e Other expenditures for facilities and programs	9,474,485.	7,249,944.	4,773,671.	4,942,442.	4,185,811.
f Administrative expenses					
g End of year balance	445,636,754.	386,957,560.	306,403,790.	261,889,680.	167,681,269.

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment 80.5400 %
 - b Permanent endowment 12.5500 %
 - c Term endowment 6.9100 %
- 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:
- | | Yes | No |
|---|-----|----|
| (i) Unrelated organizations | | X |
| (ii) Related organizations | | X |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? <input type="checkbox"/> | 3b | |
- 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		14,265,669.		14,265,669.
b Buildings		747,646,060.	302,532,323.	445,113,737.
c Leasehold improvements				
d Equipment		217,668,692.	170,532,549.	47,136,143.
e Other		50,516,866.		50,516,866.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				557,032,415.

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) ALTERNATIVE	113,377,340.	END-OF-YEAR MARKET VALUE
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶	113,377,340.	

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, col. (B) line 13.) ▶		

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, col. (B) line 15.) ▶	

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) RETIREMENT PLAN OBLIGATIONS	6,728,856.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	6,728,856.

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 ...

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	634,623,337.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a 27,932,045.		
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d 33,816,897.		
e	Add lines 2a through 2d		2e	61,748,942.
3	Subtract line 2e from line 1		3	572,874,395.
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		
c	Add lines 4a and 4b		4c	0.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		5	572,874,395.

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	515,804,213.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a		
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d 8,595,790.		
e	Add lines 2a through 2d		2e	8,595,790.
3	Subtract line 2e from line 1		3	507,208,423.
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 2,286,832.		
c	Add lines 4a and 4b		4c	2,286,832.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		5	509,495,255.

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:

CERTAIN DONORS CONTRIBUTE WORKS OF ART IN LIEU OF CASH CONTRIBUTIONS. THE LABORATORY HAS UNDERTAKEN TO HOLD THE ITEMS FOR PRESERVATION FOR FUTURE GENERATIONS.

PART V, LINE 4:

THE INVESTMENT AND SPENDING POLICIES FOR THE ENDOWMENT ASSETS HAVE BEEN ESTABLISHED TO PROVIDE A PREDICTABLE STREAM OF FUNDING FOR THE PROGRAMS SUPPORTED BY THE ENDOWMENT WHILE SEEKING TO MAINTAIN THE PURCHASING POWER OF THE ENDOWMENT ASSETS. ENDOWMENT FUNDS WERE PRIMARILY SPENT ON RESEARCH, TRAINING AND EDUCATION.

Part XIII Supplemental Information (continued)

PART X, LINE 2:

THE LABORATORY IS A NOT-FOR-PROFIT ORGANIZATION AS DESCRIBED IN SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE (THE CODE), AS AMENDED, AND IS GENERALLY EXEMPT FROM INCOME TAXES PURSUANT TO THE CODE. JAX SHANGHAI AND JAX BEIJING ARE TAXABLE ENTITIES ORGANIZED UNDER THE REGULATIONS OF THE PEOPLE'S REPUBLIC OF CHINA. JAX HONG KONG IS A TAXABLE ENTITY ORGANIZED UNDER THE REGULATIONS OF HONG KONG. JAX JAPAN HOLDINGS AND JAX JAPAN ARE TAXABLE ENTITIES ORGANIZED UNDER THE REGULATIONS OF JAPAN.

IN ACCORDANCE WITH GAAP, THE LABORATORY ASSESSES WHETHER THERE ARE UNCERTAIN TAX POSITIONS AND DETERMINED THAT THERE WERE NO UNCERTAIN TAX POSITIONS THAT WOULD HAVE A MATERIAL EFFECT ON THE CONSOLIDATED FINANCIAL STATEMENTS.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

FOREIGN SUBSIDIARY NOT REPORTED ON 990	36,236,142.
NON-OPERATING EXPENSES	-2,419,245.
TOTAL TO SCHEDULE D, PART XI, LINE 2D	33,816,897.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

FOREIGN SUBSIDIARY NOT REPORTED ON 990	8,595,790.
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PART XII, LINE 4B - OTHER ADJUSTMENTS:

NON-OPERATING EXPENSES	2,286,832.
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**SCHEDULE F
(Form 990)**

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

▶ Attach to Form 990.

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

OMB No. 1545-0047

2021

Open to Public
Inspection

Name of the organization THE JACKSON LABORATORY	Employer identification number 01-0211513
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Part I General Information on Activities Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

1 For grantmakers. Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes No

2 For grantmakers. Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

3 Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in the region	(d) Activities conducted in the region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in the region	(f) Total expenditures for and investments in the region
CENTRAL AMERICA AND THE CARIBBEAN			INVESTMENTS		30,084,510.
EUROPE (INCLUDING ICELAND AND GREENLAND)			PROGRAM SERVICES	GENETIC RESOURCES	0.
MIDDLE EAST AND NORTH AFRICA			PROGRAM SERVICES	GENETIC RESOURCES	0.
NORTH AMERICA			PROGRAM SERVICES	GENETIC RESOURCES	0.
SOUTH AMERICA			PROGRAM SERVICES	GENETIC RESOURCES	0.
SOUTH ASIA			PROGRAM SERVICES	GENETIC RESOURCES	24,932.
EAST ASIA AND THE PACIFIC			PROGRAM SERVICES	RESEARCH	327,196.
RUSSIA AND THE NEWLY INDEPENDENT STATES			PROGRAM SERVICES	GENETIC RESOURCES	0.
3 a Subtotal	0	0			30,436,638.
b Total from continuation sheets to Part I	1	5			873,560.
c Totals (add lines 3a and 3b)	1	5			31,310,198.

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

Schedule F (Form 990) 2021

Part IV Foreign Forms

- 1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)* Yes No

- 2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)* Yes No

- 3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see Instructions for Form 5471)* Yes No

- 4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see Instructions for Form 8621)* Yes No

- 5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see Instructions for Form 8865)* Yes No

- 6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990)* Yes No

Part V Supplemental Information

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

FORM 990, SCH. F, PART I, LINE 3, COLUMN F

THE BASIS OF ACCOUNTING ON THE FINANCIAL STATEMENTS IS ACCRUAL.

**SCHEDULE I
(Form 990)**

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 the latest information.

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Name of the organization **THE JACKSON LABORATORY** Employer identification number **01-0211513**

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
TOWN OF BAR HARBOR 49 PARK STREET BAR HARBOR, ME 04609	01-6000061	GOV'T	112,409.	0.	FMV	N/A	GENERAL SUPPORT
UNITED WAY OF EASTERN MAINE 700 MAIN STREET SUITE 1 BANGOR, ME 04401	01-0211478	501(C)(3)	10,500.	0.	FMV	N/A	GENERAL SUPPORT
CITY OF ELLSWORTH 1 CITY HALL PLAZA ELLSWORTH, ME 04605	01-6000027	GOV'T	53,045.	0.	FMV	N/A	GENERAL SUPPORT
CONNECTICUT SCIENCE FAIR ASSOCIATION - 45 COLES ROAD - CROMWELL, CT 06416	06-6070725	501(C)(3)	7,500.	0.	FMV	N/A	GENERAL SUPPORT
CONNECTICUT SCIENCE CENTER INC. 250 COLUMBUS BLVD HARTFORD, CT 06103	06-1538101	501(C)(3)	23,333.	0.	FMV	N/A	GENERAL SUPPORT
SACRAMENTO POLICE FOUNDATION 5960 S. LAND PARK DR SACRAMENTO, CA 95822	68-0433279	501(C)(3)	7,500.	0.	FMV	N/A	GENERAL SUPPORT

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶ 7.

3 Enter total number of other organizations listed in the line 1 table ▶

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

Schedule I (Form 990) 2021

Part III Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(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
SCHOLARSHIPS/STIPENDS	2244	2,588,685.	0.	FMV	N/A

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

FORM 990, SCH. I, PART I, LINE 2

IN RECOGNITION OF THE CLOSE RELATIONSHIP BETWEEN THE LABORATORY AND THE TOWN OF BAR HARBOR, THE LABORATORY MADE A VOLUNTARY PAYMENT TO THE TOWN.

THE MISSION OF THE UNITED WAY OF EASTERN MAINE TO IMPROVE THE LIVES OF PEOPLE IN OUR REGION IS CLOSELY ALIGNED WITH THE ORGANIZATION'S RESEARCH AND EDUCATIONAL MISSION.

Part IV Supplemental Information

IN RECOGNITION OF THE CLOSE RELATIONSHIP BETWEEN THE LABORATORY AND THE CITY OF ELLSWORTH, THE LABORATORY MADE A VOLUNTARY PAYMENT TO THE CITY.

THE LABORATORY SPONSORED THE 2021 CONNECTICUT SCIENCE FAIR IN ORDER TO PROMOTE RESEARCH AND EDUCATION WHICH IS CLOSELY ALIGNED WITH THE ORGANIZATION'S RESEARCH AND EDUCATIONAL MISSION.

IN RECOGNITION OF THE CLOSE RELATIONSHIP BETWEEN THE LABORATORY AND THE SACRAMENTO POLICE DEPARTMENT, THE LABORATORY MADE A VOLUNTARY PAYMENT TO THE SACRAMENTO POLICE FOUNDATION.

IN RECOGNITION OF THE IMPORTANCE OF THE PUBLIC LIBRARY AND MEETING PLACE TO THE COMMUNITY, THE LABORATORY MADE A VOLUNTARY PAYMENT TO THE JESUP MEMORIAL LIBRARY.

THE MISSION OF THE CONNECTICUT SCIENCE CENTER TO INSPIRE LIFE-LONG LEARNING THROUGH THE OPERATION OF A SCIENCE CENTER IS CLOSELY ALIGNED WITH THE ORGANIZATION'S EDUCATIONAL MISSION.

THE ALLOCATION OF GRANTS AND OTHER ASSISTANCE TO LOCAL ORGANIZATIONS IS DETERMINED ON AN ANNUAL BASIS. VARYING AMOUNTS OF ASSISTANCE IN THE FORM OF GRANTS, FELLOWSHIPS AND STIPENDS ARE AWARDED TO SUMMER STUDENTS, LABORATORY INTERNS, GRADUATE STUDENTS, INSTRUCTORS AND COURSE ATTENDEES BASED ON NEED AND MERIT.

ALL RECIPIENTS OF GRANT FUNDS EITHER WORK AT THE LABORATORY UNDER THE SUPERVISION OF LABORATORY EMPLOYEES OR ATTEND COURSES. CONFERENCE ORGANIZERS REGULARLY MONITOR ATTENDANCE OF COURSES BY GRANT RECIPIENTS,

Part IV Supplemental Information

AND RESPONSIBLE FACULTY MEMBERS OVERSEE AND MONITOR OTHER FORMS OF

SCHOLARSHIP ASSISTANCE TO INDIVIDUAL STUDENTS, INTERNS OR OTHER

SCIENTISTS THROUGH OVERSIGHT OF THEIR ASSIGNMENTS.

THE LABORATORY GRANTS SCHOLARSHIPS TO A SELECT NUMBER OF HIGH SCHOOL

STUDENTS ON AN ANNUAL BASIS.

**SCHEDULE J
(Form 990)**

Compensation Information

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service

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.**

Name of the organization **THE JACKSON LABORATORY** Employer identification number **01-0211513**

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.

- | | |
|---|--|
| <input type="checkbox"/> First-class or charter travel | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input checked="" type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain **1b** X

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? **2** X

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.

<input checked="" type="checkbox"/> Compensation committee	<input type="checkbox"/> Written employment contract
<input checked="" type="checkbox"/> Independent compensation consultant	<input checked="" type="checkbox"/> Compensation survey or study
<input checked="" type="checkbox"/> Form 990 of other organizations	<input checked="" type="checkbox"/> 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? **4a** X

b Participate in or receive payment from a supplemental nonqualified retirement plan? **4b** X

c Participate in or receive payment from an equity-based compensation arrangement? **4c** X

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? **5a** X

b Any related organization? **5b** X

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? **6a** X

b Any related organization? **6b** X

If "Yes" on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III **7** X

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

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

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

Schedule J (Form 990) 2021

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) EDISON T. LIU, MD (UNTIL 11/21) PRESIDENT & CEO	(i)	833,009.	250,000.	405,338.	277,655.	25,639.	1,791,641.	200,000.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) AUROBINDO NAIR EXECUTIVE VP & PRESIDENT JMCRS	(i)	813,860.	300,300.	365,824.	69,000.	27,810.	1,576,794.	240,000.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) S. CATHERINE LONGLEY EXECUTIVE VICE PRESIDENT & COO	(i)	560,667.	269,561.	36,619.	99,000.	12,515.	978,362.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) KENNETH H. FASMAN SENIOR VICE PRESIDENT RESEARCH	(i)	456,871.	132,613.	3,564.	97,200.	30,767.	721,015.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(5) CHARLES MILLER CEO, THE JACKSON LABORATORY ANITECH	(i)	193,826.	66,554.	288,529.	49,527.	21,605.	620,041.	0.
	(ii)	90,000.	0.	0.	0.	0.	90,000.	0.
(6) DOUGLAS ABBOTT CHIEF FINANCIAL OFFICER	(i)	384,313.	92,667.	11,460.	59,000.	28,749.	576,189.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(7) NADIA A. ROSENTHAL SCIENTIFIC DIRECTOR	(i)	436,787.	70,664.	7,893.	29,000.	1,359.	545,703.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(8) KATHY VANDEGRIFT (UNTIL 11/21) ASSOC. GM, SITE DIR & PROD	(i)	377,977.	91,719.	7,742.	29,000.	25,565.	532,003.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(9) JENS RUETER MEDICAL DIRECTOR	(i)	389,355.	69,823.	2,970.	29,000.	29,841.	520,989.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(10) CHARLES LEE, MD SCIENTIFIC DIRECTOR, JAX GM	(i)	372,303.	56,778.	2,681.	29,000.	31,483.	492,245.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(11) BARBARA-JEAN BORMANN-KENNEDY VP SCI TRANSLATION/ALLIANCES	(i)	367,527.	73,586.	19,214.	29,000.	1,247.	490,574.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(12) EMILY SCHORER CHIEF HUMAN RESOURCES OFFICER	(i)	345,308.	60,928.	47,078.	29,000.	1,196.	483,510.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(13) DANIEL HOAG GENERAL COUNSEL & SECRETARY	(i)	249,588.	0.	90,636.	1,585.	16,353.	358,162.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(14) JOHN RYAN FORMER GENERAL COUNSEL & SECRETARY	(i)	54,046.	103,428.	125.	1,400.	0.	158,999.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 1A:

TAX INDEMNIFICATION AND GROSS-UP PAYMENTS: THE JACKSON LABORATORY GROSSES UP THE AMOUNT ADDED TO WAGES FOR IMPUTED INSURANCE PREMIUMS FOR LIFE, DISABILITY, AND LONG TERM CARE BENEFITS FOR THE SENIOR MANAGEMENT GROUP TO COVER TAXES. THE LABORATORY ALSO GROSSES UP WAGES TO COVER THE TAX IMPACT OF GIFT CARDS AND OTHER AWARDS OR PRIZES TO EMPLOYEES SO THAT THE RECIPIENTS RECEIVE THE FULL VALUE OF THE GIFT OR AWARD.

PART I, LINE 4B:

THE LABORATORY MAINTAINS A DEFERRED COMPENSATION PLAN UNDER SECTION 457(F):

CONTRIBUTIONS MADE:

PRESIDENT/CEO \$ 250,000

EXECUTIVE VICE PRESIDENT/COO \$70,000

SENIOR VICE PRESIDENT OF RESEARCH \$68,200

EXECUTIVE VP/PRESIDENT JMCRS \$ 40,000

CHIEF FINANCIAL OFFICER \$30,000

CEO, THE JACKSON LABORATORY ANITECH BIOTECH LTD \$21,000

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

DISTRIBUTIONS MADE:

PRESIDENT/CEO \$ 215,070

EXECUTIVE VP/PRESIDENT JMCRS \$150,527

PART I, LINE 7:

THE TOTAL COMPENSATION PACKAGE OF CERTAIN OFFICERS, KEY EMPLOYEES, AND

OTHER EMPLOYEES INCLUDES VARIABLE COMPENSATION AWARDED BASED ON

PERFORMANCE.

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
ALAN SAWYER	KEY EMPLOYEE -N ROS	245,887.	EMPLOYMENT		X

Part V Supplemental Information.

Provide additional information for responses to questions on Schedule L (see instructions).

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF PERSON: ALAN SAWYER

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

KEY EMPLOYEE -N ROSENTHAL

(D) DESCRIPTION OF TRANSACTION: EMPLOYMENT - FAMILY MEMBER

**SCHEDULE M
(Form 990)**

Noncash Contributions

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service

- ▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**
- ▶ **Attach to Form 990.**
- ▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

Name of the organization **THE JACKSON LABORATORY** Employer identification number **01-0211513**

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				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	34	1,346,402.	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				
19 Food inventory				
20 Drugs and medical supplies	X	2	12,719.	FMV
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ()				
26 Other ()				
27 Other ()				
28 Other ()				

29 Number of Forms 8283 received by the 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 in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? **30a** X
- 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? **31** X
- 32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? **32a** X
- 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

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

Schedule M (Form 990) 2021

Part II **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.

FORM 990, SCH. M, PART I, COLUMN B

CONTRIBUTIONS

THE NUMBER OF CONTRIBUTIONS ARE REPORTED IN COLUMN B.

**SCHEDULE O
(Form 990)**

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 the latest information.

OMB No. 1545-0047

2021

Open to Public
Inspection

Name of the organization

THE JACKSON LABORATORY

Employer identification number

01-0211513

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

THE PURPOSES OF THE LABORATORY ARE SCIENTIFIC, MEDICAL, CHARITABLE, AND
EDUCATIONAL. OUR MISSION IS TO DISCOVER PRECISE GENOMIC SOLUTIONS FOR
DISEASE AND EMPOWER THE BIOMEDICAL COMMUNITY.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

DISEASES AND BRING ADVANCED THERAPIES TO PATIENTS. THE LABORATORY ALSO
HOSTS THE MOUSE GENOME INFORMATICS DATABASES, THE WORLD'S SOURCE FOR
INFORMATION ON MOUSE GENETICS AND BIOLOGY.

IN 2021, 600 MOUSE STRAINS WERE DONATED TO THE LABORATORY OR DEVELOPED

BY JAX RESEARCH STAFF WITH ACADEMIC/FOUNDATION OR PUBLICLY FUNDED

RESEARCH PROGRAMS. THE LABORATORY MAKES THESE RESOURCES PUBLICLY

ACCESSIBLE THROUGH ITS REPOSITORY, PRODUCTION AND RESEARCH SERVICES.

DISTRIBUTION OF THESE STRAINS HELPS SUPPORT CURES FOR THE WORLD'S MOST

PREVALENT HUMAN DISEASES AND ACCELERATES THE TIME TO BRING NEW

THERAPIES TO PATIENTS. THE LABORATORY COLLABORATED WITH OTHER

NON-PROFIT PATIENT FOUNDATIONS FOR RARE DISEASES TO ESTABLISH MOUSE

RESOURCES TO FURTHER PRECLINICAL THERAPEUTIC STUDIES.

THE LABORATORY MAKES THE JAX CLINICAL KNOWLEDGEBASE (CKB) RESOURCE

PUBLICLY AVAILABLE, ENABLING CLINICIANS, AND TRANSLATIONAL RESEARCHERS

TO INTERPRET COMPLEX CANCER GENOMIC PROFILES. ACCEPTANCE AND USAGE OF

CKB HAS BEEN STEADILY INCREASING; CKB HAS RECEIVED OVER 750,000 VISITS

SINCE ITS LAUNCH IN 2016. THE PUBLIC SITE HAD OVER 2,500,000 PAGE VIEWS

IN THAT PERIOD.

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

Schedule O (Form 990) 2021

132211 11-11-21

Name of the organization THE JACKSON LABORATORY	Employer identification number 01-0211513
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FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:

THE LABORATORY HAS HAD A NATIONAL CANCER INSTITUTE-DESIGNATED CANCER CENTER, ONE OF ONLY SEVEN SUCH DESIGNATED INSTITUTIONS IN THE UNITED STATES. TO DATE 26 NOBEL PRIZES ARE ASSOCIATED WITH LABORATORY RESEARCH, EDUCATION PROGRAMS AND RESOURCES.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

INTERCOMPANY REVENUE/OTHER REVENUE EXPENSES \$ 0. INCLUDING GRANTS OF \$ 0. REVENUE \$ 1,640,811.

FORM 990, PART III, LINE 1

THE PURPOSES OF THE LABORATORY ARE SCIENTIFIC, MEDICAL, CHARITABLE, AND EDUCATIONAL TO DISCOVER PRECISE GENOMIC SOLUTIONS FOR DISEASE AND EMPOWER THE BIOMEDICAL COMMUNITY. TO ACCOMPLISH THIS MISSION, THE LABORATORY:

1) CONDUCTS BASIC BIOMEDICAL RESEARCH TO INCREASE THE KNOWLEDGE OF DEVELOPMENT, GROWTH, REPRODUCTION, PHYSIOLOGY, AND PATHOPHYSIOLOGY THROUGH RESEARCH WITH GENETICALLY DEFINED EXPERIMENTAL MOUSE MODELS AND OTHER MODELS OF DISEASE;

2) CONDUCTS TRANSLATIONAL BIOMEDICAL RESEARCH TO IDENTIFY THE GENOMIC IMPACT ON HUMAN DISEASE, PROMOTE THE ESTABLISHMENT OF MORE PRECISE, TARGETED THERAPIES, OFFER CUTTING EDGE GENOMIC DIAGNOSTICS TO IMPROVE PATIENT CARE, AND PROVIDE ADVANCED COMPUTATIONAL TOOLS, DATABASES AND KNOWLEDGE MANAGEMENT SYSTEMS TO THE BIOMEDICAL RESEARCH AND MEDICAL COMMUNITIES;

Name of the organization THE JACKSON LABORATORY	Employer identification number 01-0211513
--	--

3) TRAINS AND EDUCATES STUDENTS, SCIENTISTS, PHYSICIANS, AND OTHER

PROFESSIONALS IN THESE AREAS; AND

4) PROMOTES SCIENTIFIC DISCOVERY THROUGH THE PROVISION OF MOUSE MODELS

AND OTHER MODELS OF HUMAN DISEASE AND THE PROVISION OF RESEARCH,

CLINICAL, COMPUTATIONAL AND INFORMATION SERVICES TO THE GLOBAL

SCIENTIFIC AND MEDICAL COMMUNITIES.

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

FORM 990 REVIEW PROCESS

THE AUDIT AND ENTERPRISE RISK MANAGEMENT COMMITTEE OF THE JACKSON

LABORATORY'S BOARD OF TRUSTEES REVIEWS A DRAFT COPY OF THE IRS FORM 990

BEFORE IT IS PROVIDED TO THE BOARD OF

TRUSTEES. AFTER THE AUDIT AND ENTERPRISE RISK MANAGEMENT COMMITTEE'S

REVIEW, THE PUBLIC DISCLOSURE COPY OF IRS FORM 990 IS FINALIZED AND

PROVIDED TO THE BOARD OF TRUSTEES PRIOR TO FILING WITH THE INTERNAL REVENUE

SERVICE.

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

THE JACKSON LABORATORY REQUESTS ALL OFFICERS, BOARD MEMBERS AND KEY

EMPLOYEES COMPLETE A "CERTIFICATION OF COMPLIANCE WITH CONFLICT OF INTEREST

POLICY AND CODE OF ETHICS" FORM AND A "CONFLICT OF INTEREST DISCLOSURE

FORM" QUESTIONNAIRE, AND DISTRIBUTES ALL POLICIES REGARDING THE CONFLICT OF

INTEREST AND CODE OF ETHICS. THIS PROCESS IS DONE ANNUALLY. THE DISCLOSURE

AND COMPLIANCE ATTESTATIONS ARE RETURNED TO THE GENERAL COUNSEL, WHERE THEY

ARE RECORDED AND TALLIED FOR COMPLETENESS. DISCLOSURES, AS WELL AS ANY

FOLLOW UP QUESTIONS, ARE ROUTED THROUGH GENERAL COUNSEL, AND IF NECESSARY

Name of the organization THE JACKSON LABORATORY	Employer identification number 01-0211513
--	--

THE AUDIT AND ENTERPRISE RISK COMMITTEE, TRUSTEES AND EXECUTIVES WITH AN APPARENT OR ACTUAL CONFLICT OF INTEREST RECUSE THEMSELVES FROM DECISION MAKING.

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

COMPENSATION POLICY

THE COMPENSATION AND HUMAN RESOURCES COMMITTEE OF THE BOARD OF TRUSTEES REVIEWS AND APPROVES COMPENSATION AND BENEFITS FOR THE CHIEF EXECUTIVE OFFICER AND THE COMMITTEE REVIEWS THE COMPENSATION AND BENEFITS FOR THE OFFICERS AND KEY EMPLOYEES LISTED IN SCHEDULE J. MEMBERS OF THE COMMITTEE ARE INDEPENDENT TRUSTEES SELECTED BY THE CHAIR OF THE BOARD OF TRUSTEES.

THE COMMITTEE IS GUIDED BY COMPENSATION MARKET DATA FOR SIMILAR POSITIONS IN COMPARABLE ORGANIZATIONS. MARKET DATA IS PREPARED FOR THE COMMITTEE BY AN EXTERNAL EXECUTIVE COMPENSATION FIRM WHICH CONSIDERS COMPENSATION INFORMATION REPORTED IN FORM 990'S OF COMPARABLE ORGANIZATIONS AND THE RESULTS OF RECOGNIZED COMPENSATION SURVEYS. THE CHIEF HUMAN RESOURCES OFFICER IS AVAILABLE TO THE COMMITTEE TO PROVIDE ANY OTHER DATA NEEDED.

THE CEO MEETS WITH THE COMMITTEE AT LEAST ANNUALLY TO REVIEW THE COMPENSATION OF HIS DIRECT REPORTS. THE COMMITTEE'S REVIEW PROCESS AND RESULTS ARE DOCUMENTED IN MINUTES OF THE MEETINGS.

FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY OF FORM 990:

AR, CA, CO, CT, FL, GA, IL, MA, ME, MI, MS, NC, ND, NH, NJ, NM, NY, OH, OK, OR, PA, RI, SC, VA, WA
WI, WV

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

**SCHEDULE R
(Form 990)**

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

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

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Name of the organization **THE JACKSON LABORATORY** Employer identification number **01-0211513**

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
JACKSON LABORATORY HOLDINGS, LLC - 01-0211513, 1209 ORANGE STREET, WILMINGTON, DE 19801	HOLDINGS	DELAWARE	-755,563.	80,764,818.	JACKSON LAB

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No

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

Schedule R (Form 990) 2021

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)		X
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)		X
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		X
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) JACKSON LABORATORY HONG KONG HOLDINGS LTD.	B	3,750,000.	FMV
(2) THE JACKSON LABORATORY M&T (SHANGHAI) CO, LTD	R	4,966,225.	FMV
(3) THE JACKSON LABORATORY JAPAN HOLDINGS, INC.	B	75,911,497.	FMV
(4) JACKSON LABORATORY JAPAN HOLDINGS INC	D	43,372,192.	FMV
(5)			
(6)			

