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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust

OMB No 1545-0052

2008

Treated as a Private Foundation

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2008, or tax year beginning

07/01, 2008, and ending

06/30, 2009

G Check all that apply ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

HARVEY W. PETERS RESEARCH FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

C/O FIRST PREMIER BANK TRUST DEPARTMENT

601 S. MINNESOTA

City or town, state, and ZIP code

SIOUX FALLS, SD 57101

A Employer identification number

46-0459671

B Telephone number (see page 10 of the instructions)

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year (from Part II, col (c), line 16) ☐ Accounting method ☐ Cash ☒ Accrual

Other (specify) _____ (Part I, column (d) must be on cash basis)

16) \$ 4,171,996.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	90,000.	STMT 1		
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	1,264.	1,264.		STMT 2
4 Dividends and interest from securities	95,411.	95,411.		STMT 3
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-219,498.			
b Gross sales price for all assets on line 6a	1,542,839.			
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10 a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	2,027.	2,027.		STMT 4
12 Total. Add lines 1 through 11	-30,796.	98,702.		
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule) STMT 5	334.	334.	NONE	NONE
b Accounting fees (attach schedule) STMT 6	60,000.	60,000.	NONE	NONE
c Other professional fees (attach schedule) STMT 7	84.	84.		
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) *	3,800.	3,800.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) STMT 9	92,865.	92,865.		
24 Total operating and administrative expenses. Add lines 13 through 23	157,083.	157,083.	NONE	NONE
25 Contributions, gifts, grants paid	210,245.			210,245.
26 Total expenses and disbursements. Add lines 24 and 25	367,328.	157,083.	NONE	210,245.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-398,124.			
b Net investment income (if negative, enter -0-)		-0-		
c Adjusted net income (if negative, enter -0-)			-0-	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. ** STMT 8

Form 990-PF (2008)

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SIOUX FALLS, SD
COURTNEY J. JENSENRevenue
Operating and Administrative Expenses

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments	356,949.	119,828.	119,828.	
	3	Accounts receivable				
		Less allowance for doubtful accounts				
	4	Pledges receivable				
		Less allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)				
	7	Other notes and loans receivable (attach schedule)				
		Less allowance for doubtful accounts				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10 a	Investments - U.S. and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule) STMT 10	4,114,794.	2,758,083.	2,758,083.	
	c	Investments - corporate bonds (attach schedule)				
	Liabilities	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)				
12		Investments - mortgage loans				
13		Investments - other (attach schedule) STMT 11	1,365,988.	1,241,932.	1,241,932.	
14		Land, buildings, and equipment basis				
		Less accumulated depreciation (attach schedule)				
15		Other assets (describe)	2,395,936.	52,153.	52,153.	
16		Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	8,233,667.	4,171,996.	4,171,996.	
17		Accounts payable and accrued expenses	NONE			
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe) STMT 12	6,435,946.	3,859,313.		
	23	Total liabilities (add lines 17 through 22)	6,435,946.	3,859,313.		
Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.	24	Unrestricted	1,797,721.	312,683.		
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>	27	Capital stock, trust principal, or current funds			
		28	Paid-in or capital surplus, or land, bldg., and equipment fund			
		29	Retained earnings, accumulated income, endowment, or other funds			
		30	Total net assets or fund balances (see page 17 of the instructions)	1,797,721.	312,683.	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	8,233,667.	4,171,996.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,797,721.
2	Enter amount from Part I, line 27a	2	-398,124.
3	Other increases not included in line 2 (itemize)	3	84,556.
4	Add lines 1, 2, and 3	4	1,484,153.
5	Decreases not included in line 2 (itemize) SEE STATEMENT 13	5	1,171,470.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	312,683.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE PART IV SCHEDULE					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)			2	-219,498.	
<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> </div>					
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			3		
<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8. </div> </div>					

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2007	4,255,111.	6,459,526.	0.658734
2006	582,668.	7,156,306.	0.081420
2005	513,770.	6,946,237.	0.073964
2004	498,402.	6,664,226.	0.074788
2003	250,000.	6,870,389.	0.036388
2 Total of line 1, column (d)			2 0.925294
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.185059
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5			4 4,300,399.
5 Multiply line 4 by line 3			5 795,828.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6			7 795,828.
8 Enter qualifying distributions from Part XII, line 4			8 210,245.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	NONE
Date of ruling letter _____ (attach copy of ruling letter if necessary - see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
3 Add lines 1 and 2			
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	NONE
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		4	NONE
6 Credits/Payments		5	NONE
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a 17,337.	7	17,337.
b Exempt foreign organizations-tax withheld at source	6b NONE		
c Tax paid with application for extension of time to file (Form 8868)	6c NONE		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		8	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		9	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		10	17,337.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		11	
11 Enter the amount of line 10 to be Credited to 2009 estimated tax 17,337. Refunded			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		X
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		X
If "Yes," attach a detailed description of the activities		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
4b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by General Instruction T		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) SD		
8b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	
SEE STATEMENT 14		

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(3)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ▶ <u>N/A</u>				
14	The books are in care of ▶ <u>THE FOUNDATION C/O FPB</u> Telephone no ▶ <u>605 335-1786</u>			
	Located at ▶ <u>SIOUX FALLS, SOUTH DAKOTA</u> ZIP + 4 ▶ <u>57101</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here N/A ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ <u>15</u>			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008? <input type="checkbox"/>	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years ▶ _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 20 of the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐ Yes ☒ No **5b** N/A

Organizations relying on a current notice regarding disaster assistance check here. ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No **N/A**

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No **6b** X

If you answered "Yes" to 6b, also file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No **7b** N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 15		NONE	NONE	NONE

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 ☐ NONE

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services NONE

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3	

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	4,045,355.
b	Average of monthly cash balances	1b	320,532.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	4,365,887.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	4,365,887.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	65,488.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,300,399.
6	Minimum investment return. Enter 5% of line 5	6	215,020.

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	215,020.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	NONE
b	Income tax for 2008 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	NONE
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	215,020.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	215,020.
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	215,020.

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	210,245.
b	Program-related investments - total from Part IX-B	1b	NONE
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	210,245.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	210,245.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				215,020.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2008				
a From 2003	184,577.			
b From 2004	168,387.			
c From 2005	175,008.			
d From 2006	230,051.			
e From 2007	3,950,661.			
f Total of lines 3a through e	4,708,684.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$	210,245.			
a Applied to 2007, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2008 distributable amount				210,245.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))	4,775.			4,775.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,703,909.			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)	179,802.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	4,524,107.			
10 Analysis of line 9				
a Excess from 2004	168,387.			
b Excess from 2005	175,008.			
c Excess from 2006	230,051.			
d Excess from 2007	3,950,661.			
e Excess from 2008				

Form 990-PF (2008)

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling

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

	Tax year	Prior 3 years			(e) Total
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 27 of the instructions.)

1 Information Regarding Foundation Managers:

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

N/A

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

N/A

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT 16				
Total			3a	210,245.
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations



1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)	X	
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☒ Yes ☐ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
HARVEY W. PETERS (VIRGINIA) HOLDING CORPORATION	501(C)(2)	THE REPORTING ENTITY IS THE SOLE MEMBER OF THE HARVEY W. PETERS (VIRGINIA) HOLDING CORPORATION

Sign Here	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 taxpayer or fiduciary) is based on all information of which preparer has any knowledge.		
	 Signature of officer or trustee		Date 2-10-10
Paid Preparer's Use Only	Preparer's signature  Hal C. Ridgway		Date FEB 09 2010
	Firm's name (or yours if self-employed), address, and ZIP code KPMG LLP 1021 EAST CARY STREET, SUITE 2000 RICHMOND, VA 23219		Check if self-employed <input type="checkbox"/> Preparer's identifying number (See Signature on page 30 of the instructions) P00968087
	EIN ▶ 13-5565207		Phone no 804-782-4200

Form **990-PF** (2008)

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, and 990-PF.

OMB No 1545-0047

2008

Name of the organization

HARVEY W. PETERS RESEARCH FOUNDATION

Employer identification number

46-0459671

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (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 organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3 % support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.

- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to 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. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$ _____

Caution. Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization HARVEY W. PETERS RESEARCH FOUNDATION

Employer identification number

46-0459671

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	EDWARD BECHER VIA 6541 TALLWOOD DRIVE ROANOKE, VA 24018	\$ 90,000.	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
NONE		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					20,266.	
		VIA GROUP - S/T					VAR	VAR
		73,279.					-73,279.	
		SEE ATTACHMENT A - S/T					VAR	VAR
		127,990.					-30,877.	
		SEE ATTACHMENT B - L/T					VAR	VAR
97,113.		1,561,068.					-135,608.	
1,425,460.								
TOTAL GAIN (LOSS)							----- -219,498. =====	

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ **Attach to Form 1041, Form 5227, or Form 990-T. See the separate instructions for Form 1041 (also for Form 5227 or Form 990-T, if applicable).**

OMB No 1545-0092

2008

Name of estate or trust

Employer identification number

HARVEY W. PETERS RESEARCH FOUNDATION

46-0459671

Note: Form 5227 filers need to complete **only** Parts I and II

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-104,156.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2007 Capital Loss Carryover Worksheet	4	()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	-104,156.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a <u>LONG-TERM CAPITAL GAIN DIVIDENDS</u>			<u>STMT 1</u>		<u>20,266.</u>

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-135,608.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2007 Capital Loss Carryover Worksheet	11	()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	-115,342.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2008

Part III Summary of Parts I and II**Caution:** Read the instructions *before* completing this part

		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	Net short-term gain or (loss)	13		-104,156.
14	Net long-term gain or (loss):			
a	Total for year	14a		-115,342.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b		
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a	15		-219,498.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and **do not** complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of a The loss on line 15, column (3) or b \$3,000	16	(3,000.)
-----------	---	-----------	-----------

Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the worksheet on page 8 of the instructions if

- Either line 14b, col (2) or line 14c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17		
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18		
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19		
20	Add lines 18 and 19	20		
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-	21		
22	Subtract line 21 from line 20. If zero or less, enter -0-	22		
23	Subtract line 22 from line 17. If zero or less, enter -0-	23		
24	Enter the smaller of the amount on line 17 or \$2,200	24		
25	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26, go to line 27 and check the "No" box <input type="checkbox"/> No. Enter the amount from line 23	25		
26	Subtract line 25 from line 24	26		
27	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27		
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28		
29	Subtract line 28 from line 27	29		
30	Multiply line 29 by 15% (15)	30		
31	Figure the tax on the amount on line 23. Use the 2008 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions)	31		
32	Add lines 30 and 31	32		
33	Figure the tax on the amount on line 17. Use the 2008 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions)	33		
34	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on line 1a of Schedule G, Form 1041 (or line 36 of Form 990-T)	34		

Schedule D (Form 1041) 2008

FEDERAL CAPITAL GAIN DIVIDENDS

=====

LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS

FROM MARSHALL & ILSLEY

20,266.

TOTAL 15% RATE CAPITAL GAIN DIVIDENDS

20,266.

TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS

20,266.

=====

**Continuation Sheet for Schedule D
(Form 1041)**

OMB No 1545-0092

2008

► See instructions for Schedule D (Form 1041).

► Attach to Schedule D to list additional transactions for lines 1a and 6a.

Name of estate or trust

Employer identification number

HARVEY W. PETERS RESEARCH FOUNDATION

46-0459671

Part I **Short-Term Capital Gains and Losses - Assets Held One Year or Less**[illegible]

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b -104,156.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2008

ATTACHMENT A 1/1

JSA
8F0971 1 000

Employer identification number

[illegible]

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b	-135,608.
--	-----------

JSA

8F 1222 2 000

63425C 2186

V08-8.3 789811

42

HARVEY W PETERS RESEARCH FOUNDATION
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
15% RATE CAPITAL GAINS (LOSSES)					
525. AMERICAN INTL GROUP INC	07/17/1996	09/16/2008	1,475.24	11,533.81	-10,058.57
450. AMERICAN INTL GROUP INC	01/17/1995	09/16/2008	1,377.37	15,756.67	-14,379.30
400. BANK OF AMERICA CORP COM	11/23/2005	09/25/2008	13,806.24	19,252.00	-5,445.76
900. BANK OF AMERICA CORP COM	10/25/2007	02/03/2009	4,886.97	44,253.75	-39,366.78
700. BARCLAYS BK PLC IPATH					
INDEX LKD SECS LKD TO DOW	10/25/2007	01/28/2009	23,337.86	37,947.00	-14,609.14
600. BECTON DICKINSON & CO	04/17/2007	05/29/2009	40,165.48	47,212.26	-7,046.78
200. BEST BUY INC COM	12/09/2002	12/04/2008	4,515.87	3,453.51	1,062.36
575. C H ROBINSON WORLDWIDE INC					
COM NEW	03/30/2006	01/06/2009	30,712.30	28,721.25	1,991.05
125. CELGENE CORP COM	11/28/2007	12/03/2008	6,528.11	7,978.19	-1,450.08
25. CHEVRON TEXACO CORP COM	02/14/2008	06/15/2009	1,766.70	2,068.83	-302.13
.845 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	07/28/2008	15.92	20.00	-4.08
.936 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	07/28/2008	16.86	22.16	-5.30
.823 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	08/29/2008	13.11	19.48	-6.37
.486 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	09/12/2008	8.51	11.51	-3.00
.767 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	09/18/2008	11.56	18.16	-6.60
.133 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	10/21/2008	1.12	3.15	-2.03
.875 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	11/19/2008	6.42	20.71	-14.29
.603 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	12/19/2008	3.43	14.27	-10.84
.187 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	01/22/2009	1.19	4.43	-3.24
.129 COHEN & STEERS REIT &					
UTIL INCOME FD INC COM	05/08/2007	04/20/2009	0.66	3.05	-2.39
Totals					

JSA
8FC970 1 000

ATTACHMENT B 1/6

HARVEY W PETERS RESEARCH FOUNDATION
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
125. DANAHER CORP	01/21/2003	06/15/2009	7,711.05	3,948.75	3,762.30
75. EMERSON ELEC CO COM	09/19/2007	06/15/2009	2,544.68	3,836.25	-1,291.57
200. EXXON MOBIL CORP	04/11/2001	02/10/2009	15,214.91	8,167.00	7,047.91
75. EXXON MOBIL CORP	04/11/2001	06/15/2009	5,432.86	3,062.63	2,370.23
175. GENENTECH INC COM NEW	11/15/2006	01/09/2009	14,875.03	14,486.60	388.43
575. GENERAL ELEC CO COM	05/09/1989	08/22/2008	16,743.90	5,857.80	10,886.10
173. HARTFORD FINL SVCS GROUP INC COM	09/20/2002	06/10/2009	2,341.52	9,795.60	-7,454.08
550. HARTFORD FINL SVCS GROUP INC COM	06/23/2004	06/16/2009	6,561.33	36,806.00	-30,244.67
50. ITT INDS INC COM	09/19/2007	06/15/2009	2,261.94	3,343.50	-1,081.56
.587 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	08/04/2008	9.86	12.29	-2.43
.511 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	08/04/2008	8.75	10.70	-1.95
.888 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	08/25/2008	13.69	18.60	-4.91
.206 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	09/12/2008	2.71	4.31	-1.60
.732 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	10/03/2008	7.94	15.18	-7.24
.872 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	11/06/2008	9.28	18.09	-8.81
.211 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	12/10/2008	1.72	4.38	-2.66
.306 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	12/30/2008	2.97	6.35	-3.38
.885 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	02/17/2009	8.25	18.36	-10.11
.892 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	03/04/2009	7.46	18.50	-11.04
.335 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	04/08/2009	3.20	6.95	-3.75
.111 ING GLOBAL EQUITY DIVID & PREM OPPTY FD COM	03/20/2007	04/30/2009	1.11	2.30	-1.19
Totals					

JSA
8F0970 1 000

ATTACHMENT B 2/6

HARVEY W PETERS RESEARCH FOUNDATION
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
100. INTERNATIONAL BUSINESS					
MACHS COM	05/05/2008	06/08/2009	10,611.72	12,194.00	-1,582.28
75. MCDONALDS CORP COM	04/17/2007	06/15/2009	4,336.38	3,620.25	716.13
825. MICROCHIP TECHNOLOGY INC	03/30/2006	10/15/2008	21,342.63	29,518.50	-8,175.87
175. MORGAN STANLEY DEAN WITTER					
DISCOVER & CO COM NEW	08/17/2007	10/10/2008	1,578.49	10,945.49	-9,367.00
100. NATIONAL-OILWELL INC COM	11/15/2006	07/08/2008	8,024.55	3,115.43	4,909.12
650. NOKIA CORP SPONSORED ADR	03/30/2006	10/15/2008	10,835.43	13,676.00	-2,840.57
150. PEABODY ENERGY CORP COM	05/24/2007	06/15/2009	5,153.75	7,663.46	-2,509.71
275. PEPSICO INC COM	10/03/2003	06/08/2009	15,011.86	13,120.25	1,891.61
75. PEPSICO INC COM	10/03/2003	06/15/2009	3,975.64	3,578.25	397.39
350. PRAXAIR INC COM	06/12/2003	06/08/2009	26,354.32	10,666.25	15,688.07
350. PROCTER & GAMBLE CO COM	11/28/2001	06/08/2009	18,560.02	13,273.99	5,286.03
75. PROCTER & GAMBLE CO COM	11/28/2001	06/15/2009	3,848.15	2,844.43	1,003.72
425. ROCKWELL COLLINS INC COM	09/19/2007	06/08/2009	20,373.97	29,616.25	-9,242.28
600. SPDR INDEX SHS FDS DJ					
WILSHIRE INTL REAL ESTATE	10/26/2007	06/15/2009	17,189.55	38,508.00	-21,318.45
50. SCHLUMBERGER LTD COM	09/19/2007	06/15/2009	2,890.92	5,374.50	-2,483.58
2350. SELECT SECTOR SPDR TR					
TECHNOLOGY	10/25/2007	02/10/2009	36,072.29	64,648.50	-28,576.21
500. SELECT SECTOR SPDR TR					
TECHNOLOGY	10/25/2007	06/08/2009	9,064.76	13,755.00	-4,690.24
1000. SELECT SECTOR SPDR TR					
TECHNOLOGY					
1150. STAPLES INC COM	10/25/2007	06/15/2009	18,039.53	27,510.00	-9,470.47
450. TARGET CORP COM	09/12/2002	06/16/2009	23,436.39	13,695.23	9,741.16
200. 3M CO COM	07/30/1999	06/08/2009	18,143.53	14,647.50	3,496.03
100. UNITED TECHNOLOGIES CORP	08/16/2006	04/27/2009	11,399.22	15,068.83	-3,669.61
200. WELLPOINT INC COM	06/12/2003	06/08/2009	5,634.85	3,635.50	1,999.35
1150. WRIGLEY WM JR CO COM	11/11/2004	11/11/2008	7,155.59	9,408.52	-2,252.93
3750. GOLDMAN FINANCIAL SQUARE	06/23/2004	08/22/2008	91,125.48	57,356.00	33,769.48
GOVT OBLIGATIONS #465	01/01/1990	07/01/2008	3,750.00	3,750.00	
119.78 GOLDMAN FINANCIAL SQUARE					
GOVT OBLIGATIONS #465	01/01/1990	07/03/2008	119.78	119.78	
Totals					

USA
8F0370 1 000

ATTACHMENT B 3/6

HARVEY W PETERS RESEARCH FOUNDATION
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
502.97 GOLDMAN FINANCIAL SQUARE	01/01/1990	07/09/2008	502.97	502.97	
GOVT OBLIGATIONS #465					
2932.13 GOLDMAN FINANCIAL SQUARE	01/01/1990	07/14/2008	2,932.13	2,932.13	
GOVT OBLIGATIONS #465					
5553.28 GOLDMAN FINANCIAL SQUARE	01/01/1990	07/15/2008	5,553.28	5,553.28	
GOVT OBLIGATIONS #465					
30000. GOLDMAN FINANCIAL SQUARE	01/01/1990	07/18/2008	30,000.00	30,000.00	
GOVT OBLIGATIONS #465					
88307. GOLDMAN FINANCIAL SQUARE	01/01/1990	08/01/2008	88,307.00	88,307.00	
GOVT OBLIGATIONS #465					
16262.86 GOLDMAN FINANCIAL SQUARE	01/01/1990	08/19/2008	16,262.86	16,262.86	
GOVT OBLIGATIONS #465					
3750. GOLDMAN FINANCIAL SQUARE	01/01/1990	09/02/2008	3,750.00	3,750.00	
GOVT OBLIGATIONS #465					
45000. GOLDMAN FINANCIAL SQUARE	01/01/1990	09/22/2008	45,000.00	45,000.00	
GOVT OBLIGATIONS #465					
3750. GOLDMAN FINANCIAL SQUARE	01/01/1990	10/01/2008	3,750.00	3,750.00	
GOVT OBLIGATIONS #465					
125.9 GOLDMAN FINANCIAL SQUARE	01/01/1990	10/03/2008	125.90	125.90	
GOVT OBLIGATIONS #465					
391.78 GOLDMAN FINANCIAL SQUARE	01/01/1990	10/09/2008	391.78	391.78	
GOVT OBLIGATIONS #465					
2540.12 GOLDMAN FINANCIAL SQUARE	01/01/1990	10/10/2008	2,540.12	2,540.12	
GOVT OBLIGATIONS #465					
5551.59 GOLDMAN FINANCIAL SQUARE	01/01/1990	10/17/2008	5,551.59	5,551.59	
GOVT OBLIGATIONS #465					
6000. GOLDMAN FINANCIAL SQUARE	01/01/1990	10/20/2008	6,000.00	6,000.00	
GOVT OBLIGATIONS #465					
96898. GOLDMAN FINANCIAL SQUARE	01/01/1990	10/21/2008	96,898.00	96,898.00	
GOVT OBLIGATIONS #465					
7037.46 GOLDMAN FINANCIAL SQUARE	01/01/1990	10/22/2008	7,037.46	7,037.46	
GOVT OBLIGATIONS #465					
6205.18 GOLDMAN FINANCIAL SQUARE	01/01/1990	10/24/2008	6,205.18	6,205.18	
GOVT OBLIGATIONS #465					
Totals					

JSA
8F6970 1.000

ATTACHMENT B ⁴/₆

HARVEY W PETERS RESEARCH FOUNDATION
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
5503.57 GOLDMAN FINANCIAL SQUARE	01/01/1990	11/03/2008	5,503.57	5,503.57	
GOVT OBLIGATIONS #465					
24000. GOLDMAN FINANCIAL SQUARE	01/01/1990	11/07/2008	24,000.00	24,000.00	
GOVT OBLIGATIONS #465					
2885.1 GOLDMAN FINANCIAL SQUARE	01/01/1990	11/14/2008	2,885.10	2,885.10	
GOVT OBLIGATIONS #465					
3750. GOLDMAN FINANCIAL SQUARE	01/01/1990	12/01/2008	3,750.00	3,750.00	
GOVT OBLIGATIONS #465					
5000. GOLDMAN FINANCIAL SQUARE	01/01/1990	12/05/2008	5,000.00	5,000.00	
GOVT OBLIGATIONS #465					
40000. GOLDMAN FINANCIAL SQUARE	01/01/1990	12/18/2008	40,000.00	40,000.00	
GOVT OBLIGATIONS #465					
3750. GOLDMAN FINANCIAL SQUARE	01/01/1990	01/02/2009	3,750.00	3,750.00	
GOVT OBLIGATIONS #465					
10267.76 GOLDMAN FINANCIAL SQUARE	01/01/1990	01/09/2009	10,267.76	10,267.76	
GOVT OBLIGATIONS #465					
1004.36 GOLDMAN FINANCIAL SQUARE	01/01/1990	01/12/2009	1,004.36	1,004.36	
GOVT OBLIGATIONS #465					
35400. GOLDMAN FINANCIAL SQUARE	01/01/1990	01/21/2009	35,400.00	35,400.00	
GOVT OBLIGATIONS #465					
37575. GOLDMAN FINANCIAL SQUARE	01/01/1990	01/23/2009	37,576.00	37,576.00	
GOVT OBLIGATIONS #465					
3600. GOLDMAN FINANCIAL SQUARE	01/01/1990	01/27/2009	3,600.00	3,600.00	
GOVT OBLIGATIONS #465					
3750. GOLDMAN FINANCIAL SQUARE	01/01/1990	02/02/2009	3,750.00	3,750.00	
GOVT OBLIGATIONS #465					
1333.78 GOLDMAN FINANCIAL SQUARE	01/01/1990	02/06/2009	1,333.78	1,333.78	
GOVT OBLIGATIONS #465					
3750. GOLDMAN FINANCIAL SQUARE	01/01/1990	03/02/2009	3,750.00	3,750.00	
GOVT OBLIGATIONS #465					
5200. GOLDMAN FINANCIAL SQUARE	01/01/1990	03/06/2009	5,200.00	5,200.00	
GOVT OBLIGATIONS #465					
45000. GOLDMAN FINANCIAL SQUARE	01/01/1990	03/19/2009	45,000.00	45,000.00	
GOVT OBLIGATIONS #465					
Totals					

USA
8F0370 1.000

ATTACHMENT B 5/6

HARVEY W PETERS RESEARCH FOUNDATION
Schedule D Detail of Long-term Capital Gains and Losses

[illegible]

FORM 990PF, PART I - CONTRIBUTIONS, GIFTS AND GRANTS RECEIVED

NAME AND ADDRESS	DATE	DIRECT PUBLIC SUPPORT
EDWARD BECHER VIA 6541 TALLWOOD DRIVE ROANOKE, VA 24018	VAR	90,000.
TOTAL CONTRIBUTION AMOUNTS		90,000.

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
INTEREST - GOLDMAN SACHS	1,264.	1,264.
	-----	-----
TOTAL	1,264.	1,264.
	=====	=====

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DIVIDENDS - MONEY MARKET	2,582.	2,582.
DOMESTIC DIVIDENDS	71,447.	71,447.
DOM DIVIDENDS - VIA GROUP FIDUCIARY MGMT	21,382.	21,382.
TOTAL	95,411.	95,411.

FORM 990PF, PART I - OTHER INCOME
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
OTHER INCOME FROM MARSHALL & ILSLEY	2,027.	2,027.
	-----	-----
TOTALS	2,027.	2,027.
	=====	=====

FORM 990PF, PART I - LEGAL FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
OTHER LEGAL FEES	334.	334.		
	-----	-----	-----	-----
TOTALS	334.	334.	NONE	NONE
	=====	=====	=====	=====

FORM 990PF, PART I - ACCOUNTING FEES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
OTHER ACCOUNTING FEES	60,000.	60,000.		
TOTALS	60,000.	60,000.	NONE	NONE
	=====	=====	=====	=====

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
PROFESSIONAL FEES - VIA GROUP	84.	84.
	-----	-----
TOTALS	84.	84.
	=====	=====

FORM 990PF, PART I - TAXES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAX	915.	915.
OTHER TAXES AND FEES	2,885.	2,885.
	-----	-----
TOTALS	3,800.	3,800.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
INVESTMENT MANAGEMENT FEES	31,969.	31,969.
UTILITIES/RENT EXPENSE	110.	110.
CUSTODIAN FEES	12,974.	12,974.
REIMBURSEMENT EXPENSES	45,000.	45,000.
FOREIGN CONVERSION EXPENSE	7.	7.
OTHER EXPENSE	2,805.	2,805.
	-----	-----
TOTALS	92,865.	92,865.
	=====	=====

FORM 990PF, PART II - CORPORATE STOCK
=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
COMMON AND OTHER STOCKS	2,758,083.	2,758,083.
TOTALS	2,758,083.	2,758,083.
	=====	=====

FORM 990PF, PART II - OTHER INVESTMENTS
=====

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ----
BOND FUNDS	11,509.	11,509.
INV - VIA GROUP FIDUCIARY MGMT	1,210,223.	1,210,223.
WEIGHOUT LLC	20,200.	20,200.
	-----	-----
TOTALS	1,241,932.	1,241,932.
	=====	=====

FORM 990PF, PART II - OTHER LIABILITIES

=====

DESCRIPTION	ENDING BOOK VALUE
-----	-----
DUE TO HOLDING COMPANY	3,842,199.
DUE TO EVVCOM	16,814.
ACCRUED EXPENSES	300.
TOTALS	----- 3,859,313. =====

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES
=====DESCRIPTION
-----AMOUNT

UNREALIZED LOSS

1,171,470.

TOTAL

1,171,470.
=====

FORM 990PF, PART VII-A, LINE 10 - NEW SUBSTANTIAL CONTRIBUTORS

NAME AND ADDRESS	DATE	DIRECT PUBLIC SUPPORT
EDWARD BECHER VIA 6541 TALLWOOD DRIVE ROANOKE, VA 24018	VAR	90,000.
TOTAL CONTRIBUTION AMOUNTS		90,000.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

TITLE AND AVERAGE HOURS PER
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

TRUSTEE

J. TRACY O'ROURKE, VARIAN ASSOC.

28023 N. 96TH PLACE

SCOTTSDALE, AZ 85262-8450

TRUSTEE

DAVID G. HOTTMAN

FIRST PREMIER BANK

TRUST DEPARTMENT

6010 S. MINNESOTA

SIOUX FALLS, SD 57101-1348

TRUSTEE

FREDERICK P. STRATTON, JR

9608 N. JUNIPER CIRCLE

MEQUON, WI 50392

FOUNDATION MANAGER

JOHN G. ROCOVICH

5264 FALCON RIDGE ROAD

ROANOKE, VA 24018

GRAND TOTALS

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS

AND

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

COLLEGE OF OSTEOPATHIC MEDICINE

P.O. BOX 13606

ROANOKE, VA 24035

PUBLIC

FINANCIAL ASSISTANCE

210,245.

TOTAL CONTRIBUTIONS PAID

210,245.

Form **8868**

(Rev. April 2009)

Department of the Treasury
Internal Revenue Service**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization HARVEY W. PETERS RESEARCH FOUNDATION		Employer identification number 46-0459671
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O FIRST PREMIER BANK TRUST DEPTMEN		
	601 S. MINNESOTA		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions SIOUX FALLS, SD 57101		

Check type of return to be filed (file a separate application for each return):

<input type="checkbox"/> Form 990	<input type="checkbox"/> Form 990-T (corporation)	<input type="checkbox"/> Form 4720
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust)	<input type="checkbox"/> Form 5227
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)	<input type="checkbox"/> Form 6069
<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A	<input type="checkbox"/> Form 8870

- The books are in the care of ▶ **THE FOUNDATION C/O FPB**

Telephone No. ▶ **605 335-1786** FAX No. ▶ _____

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **02/15, 2010** to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶ ☐ calendar year _____ or
▶ ☒ tax year beginning **07/01, 2008** and ending **06/30, 2009**

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a \$ NONE
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b \$ 17,337.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c \$ NONE

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)