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Return of Private Foundation  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

2008

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 OCT 1, 2008, and ending SEP 30, 2009

G Check all that apply  Initial return  Final return  Amended return  Address change  Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>THE RICHARD PETRITZ FOUNDATION</b> Number and street (or P O box number if mail is not delivered to street address) <b>PMB 342, 445C E. CHEYENNE MTN. BLVD</b>	Room/suite	A Employer identification number <b>84-1523842</b>
	City or town, state, and ZIP code <b>COLORADO SPRINGS, CO 80906</b>		B Telephone number <b>719-576-4622</b>
H Check type of organization	<input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		
I Fair market value of all assets at end of year (from Part II, col (c), line 16)	J Accounting method <input type="checkbox"/> Other (specify) <b>► \$ 1,674,587.</b>	<input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <b>(Part I, column (d) must be on cash basis.)</b>	
<b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income
1 Contributions, gifts, grants, etc., received			
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B Interest on savings and temporary cash investments			
3 Dividends and interest from securities		<b>49,046.</b>	<b>49,046.</b>
5a Gross rents			
b Net rental income or (loss)			
6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a		<b>-50,237.</b>	<b>104,823.</b>
7 Capital gain net income (from Part IV, line 2)			<b>0.</b>
8 Net short-term capital gain			
9 Income modifications Gross sales less returns and allowances			
10a b Less Cost of goods sold			
c Gross profit or (loss)			
11 Other income			
12 Total. Add lines 1 through 11		<b>-1,191.</b>	<b>49,046.</b>
13 Compensation of officers, directors, trustees, etc		<b>0.</b>	<b>0.</b>
14 Other employee salaries and wages			
15 Pension plans, employee benefits			
16a Legal fees			
b Accounting fees		<b>5,800.</b>	<b>5,800.</b>
c Other professional fees		<b>34,790.</b>	<b>34,790.</b>
17 Interest			
18 Taxes			
19 Depreciation and depletion			
20 Occupancy			
21 Travel, conferences, and meetings		<b>658.</b>	<b>658.</b>
22 Printing and publications			
23 Other expenses		<b>447.</b>	<b>447.</b>
24 Total operating and administrative expenses. Add lines 13 through 23		<b>41,695.</b>	<b>41,695.</b>
25 Contributions, gifts, grants paid		<b>110,359.</b>	<b>110,359.</b>
26 Total expenses and disbursements. Add lines 24 and 25		<b>152,054.</b>	<b>41,695.</b>
27 Subtract line 26 from line 12		<b>-153,245.</b>	
a Excess of revenue over expenses and disbursements			
b Net investment income (if negative, enter -0-)			<b>7,351.</b>
c Adjusted net income (if negative, enter -0-)			<b>49,046.</b>

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Form 990-PF (2008)

Part II Balance Sheets		Attached schedules and amounts in the description column should be end-of-year amounts only	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		215,710.	231,790.
	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			
	7	Other notes and loans receivable ►			
		Less allowance for doubtful accounts ►			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U S and state government obligations	STMT 5		
	b	Investments - corporate stock		1,609,012.	1,454,962.
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis ►			
		Less: accumulated depreciation ►			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment basis ►			
		Less: accumulated depreciation ►			
	15	Other assets (describe ► )			
	16	Total assets (to be completed by all filers)		1,824,722.	1,686,752.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ► )			
	23	Total liabilities (add lines 17 through 22)		0.	0.
		Foundations that follow SFAS 117, check here ► <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
Net Assets or Fund Balances	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds		0.	0.
	28	Paid-in or capital surplus, or land, bldg , and equipment fund		0.	0.
	29	Retained earnings, accumulated income, endowment, or other funds		1,824,722.	1,686,752.
	30	Total net assets or fund balances		1,824,722.	1,686,752.
	31	Total liabilities and net assets/fund balances		1,824,722.	1,686,752.

## 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	1,824,722.
2	Enter amount from Part I, line 27a	2	-153,245.
3	Other increases not included in line 2 (itemize) ► OTHER ACCOUNT TRANSFERS	3	15,275.
4	Add lines 1, 2, and 3	4	1,686,752.
5	Decreases not included in line 2 (itemize) ►	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,686,752.

**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 ATTACHED CAPITAL GAIN/LOSS SUMMARY			P	VARIOUS	VARIOUS
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 104,823.		155,060.	-50,237.		
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			-50,237.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	-50,237.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8			3	0.	

**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.

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(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	108,859.	2,196,293.	.049565
2006	112,969.	2,359,241.	.047884
2005	104,594.	2,141,641.	.048838
2004	75,887.	1,985,689.	.038217
2003	15,940.	1,629,344.	.009783

2 Total of line 1, column (d)

2 .194287

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 .038857

4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5

4 1,508,179.

5 Multiply line 4 by line 3

5 58,603.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 74.

7 Add lines 5 and 6

7 58,677.

8 Enter qualifying distributions from Part XII, line 4

8 110,359.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/>	and enter "N/A" on line 1	1	74 .	
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 checked="" 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	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0 .
3	Add lines 1 and 2			3	74 .
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	0 .
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			5	74 .
6	Credits/Payments				
a	2008 estimated tax payments and 2007 overpayment credited to 2008		6a	478 .	
b	Exempt foreign organizations - tax withheld at source		6b		
c	Tax paid with application for extension of time to file (Form 8868)		6c		
d	Backup withholding erroneously withheld		6d		
7	Total credits and payments Add lines 6a through 6d			7	478 .
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached			8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			10	404 .
11	Enter the amount of line 10 to be Credited to 2009 estimated tax ► 0 . Refunded ►			11	404 .

**Part VII-A Statements Regarding Activities**

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?			N/A	Yes	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? <i>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.</i>					
1c						
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>					
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? <i>If "Yes," attach a conformed copy of the changes</i>					
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?					
4b	If "Yes," has it filed a tax return on Form 990-T for this year?					
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>					
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?					
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>					
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ► CO					
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? <i>If "No," attach explanation</i>					
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)? <i>If "Yes," complete Part XIV</i>					
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>					

**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)(13)? If "Yes," attach schedule (see 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? Website address ► **N/A** 13   X

14 The books are in care of ► **THE RICHARD PETRITZ FOUNDATION** Telephone no ►   
 Located at ► **PMB 342, 445C E. CHEYENNE MTN BLVD, COLORADO SPRINGS, CO 80906** ZIP+4 ► **80906**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► **15** ► **N/A** ►

**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? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
(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)? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
(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) <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
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)? <span style="float: right;"><b>N/A</b></span>		
Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		
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? <span style="float: right;"><b>1c</b> <input type="checkbox"/> <input checked="" type="checkbox"/> X</span>		
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? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
If "Yes," list the years ► <span style="float: right;"><b>2a</b> <input type="checkbox"/></span>		
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 instructions) <span style="float: right;"><b>N/A</b></span>		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► <span style="float: right;"><b>2b</b> <input type="checkbox"/></span>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> X <input type="checkbox"/> No</span>		
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.) <span style="float: right;"><b>3b</b> <input type="checkbox"/></span>		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <span style="float: right;"><b>4a</b> <input type="checkbox"/> <input checked="" type="checkbox"/> X</span>		
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? <span style="float: right;"><b>4b</b> <input type="checkbox"/> <input checked="" type="checkbox"/> X</span>		

**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)?  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 instructions)?

N/A

► 

5b

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

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 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?

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No

N/A

7b

**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.

(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
PAMELA PETRITZ COOPER 370 HIDDEN CREEK DRIVE COLORADO SPRINGS, CO 80906	PRESIDENT 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

►

0

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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. 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 ►

0

**Part IX-A Summary of Direct Charitable Activities**

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

Expenses

1	NONE		
			0.
2			
3			
4			

**Part IX-B Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1	N/A		
2			

All other program-related investments. See instructions

3			

Total. Add lines 1 through 3 ► 0.

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see 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	1,249,305.
b Average of monthly cash balances	1b	281,841.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	1,531,146.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	1,531,146.
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	22,967.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,508,179.
6 Minimum investment return. Enter 5% of line 5	6	75,409.

**Part XI Distributable Amount** (see 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	75,409.
2a Tax on investment income for 2008 from Part VI, line 5	2a	74.
b Income tax for 2008 (This does not include the tax from Part VI )	2b	
c Add lines 2a and 2b	2c	74.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	75,335.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	75,335.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	75,335.

**Part XII Qualifying Distributions** (see 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	110,359.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	110,359.
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	5	74.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	110,285.

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 instructions)**

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				75,335.
2 Undistributed income, if any, as of the end of 2007			0.	
a Enter amount for 2007 only				
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4 ► \$ 110,359.			0.	
a Applied to 2007, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				75,335.
e Remaining amount distributed out of corpus	35,024.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	35,024.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	35,024.			
10 Analysis of line 9				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008	35,024.			

**Part XIV** **Private Operating Foundations** (see instructions and Part VII-A, question 9)

N/A

**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 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) )

**NONE**

**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

**NONE**

**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 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

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

### **c. Any submission deadlines**

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

## Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
<b>a Paid during the year</b>				
COLORADO SPRINGS DEBUTANTE (FAC), COLORADO SPRINGS, CO	NONE		TAX EXEMPTMISSION. TO FURTHER THE ORGANIZATION'S TAX EXEMPTMISSION.	1,000.
LANCE ARMSTRONG FOUNDATION, COLORADO SPRINGS, CO	NONE		TAX EXEMPTMISSION. TO FURTHER THE ORGANIZATION'S TAX EXEMPTMISSION.	250.
HOPE & HOME, COLORADO SPRINGS, CO	NONE		TAX EXEMPTMISSION. TO FURTHER THE ORGANIZATION'S TAX EXEMPTMISSION.	500.
PIKES PEAK COMMUNITY FOUNDATION, COLORADO SPRINGS, CO	NONE		TAX EXEMPTMISSION. TO FURTHER THE ORGANIZATION'S TAX EXEMPTMISSION.	102,109.
AVON WALK FOR BREAST CANCER, COLORADO SPRINGS, CO	NONE		TAX EXEMPTMISSION. TO FURTHER THE ORGANIZATION'S TAX EXEMPTMISSION.	500.
PEAK VENTURE GROUP, COLORADO SPRINGS, CO	NONE		TAX EXEMPTMISSION. TO FURTHER THE ORGANIZATION'S TAX EXEMPTMISSION.	1,000.
COLORADO SPRINGS TECHNOLOGY INCUBATOR, COLORADO SPRINGS, CO	NONE		TAX EXEMPTMISSION. TO FURTHER THE ORGANIZATION'S TAX EXEMPTMISSION.	5,000.
<b>Total</b>			► 3a	110,359.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			► 3b	0.

**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated

**1 Program service revenue**

a \_\_\_\_\_  
 b \_\_\_\_\_  
 c \_\_\_\_\_  
 d \_\_\_\_\_  
 e \_\_\_\_\_  
 f \_\_\_\_\_

g Fees and contracts from government agencies

**2 Membership dues and assessments****3 Interest on savings and temporary cash investments****4 Dividends and interest from securities****5 Net rental income or (loss) from real estate**

a Debt-financed property  
 b Not debt-financed property

**6 Net rental income or (loss) from personal property****7 Other investment income****8 Gain or (loss) from sales of assets other than inventory****9 Net income or (loss) from special events****10 Gross profit or (loss) from sales of inventory****11 Other revenue**

a \_\_\_\_\_  
 b \_\_\_\_\_  
 c \_\_\_\_\_  
 d \_\_\_\_\_  
 e \_\_\_\_\_

**12 Subtotal Add columns (b), (d), and (e)**

14 49,046.

**13 Total. Add line 12, columns (b), (d), and (e)**

18 -50,237.

13 -1,191.

(See worksheet in line 13 instructions to verify calculations)

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

**Line No.** Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

**NOT APPLICABLE**



FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT 1

(A) DESCRIPTION OF PROPERTY	SEE ATTACHED CAPITAL GAIN/LOSS SUMMARY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
					PURCHASED	VARIOUS	VARIOUS
		104,823.	155,060.	0.	0.		-50,237.
CAPITAL GAINS DIVIDENDS FROM PART IV							0.
TOTAL TO FORM 990-PF, PART I, LINE 6A							-50,237.

FORM 990-PF

ACCOUNTING FEES

STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	5,800.	5,800.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	5,800.	5,800.	0.	0.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATION FEES	15,722.	15,722.	0.	0.
INVESTMENT MANAGEMENT FEES	19,068.	19,068.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	34,790.	34,790.	0.	0.

FORM 990-PF

OTHER EXPENSES

STATEMENT

4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	297.	297.	0.	0.
BANK FEES	150.	150.	0.	0.
TO FORM 990-PF, PG 1, LN 23	447.	447.	0.	0.

FORM 990-PF

CORPORATE STOCK

STATEMENT

5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
TD AMERITRADE - SEE ATTACHED	1,454,962.	1,442,797.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,454,962.	1,442,797.

THE RICHARD PETRITZ FOUNDATION  
CAPITAL GAINS – 2008 TAX YEAR

10/1/2008 through 09/30/2009

Account	Security	Shares	Purchase	Sold	Gross Proceeds	Cost Basis	Realized Gain/Loss
Foundation - TD	SIMTEK CORP	7,951.00	4/28/2003	10/17/2008	20,672.60	26,723.31	(6,050.71)
Foundation - TD	BUNGE LTD	465	3/9/2007	12/26/2008	21,886.73	36,314.99	(14,428.26)
Foundation - TD	ANIXTER INTL INC COM	500	11/5/2007	12/26/2008	13,501.17	34,098.95	(20,597.78)
Foundation - TD	ANIXTER INTL INC COM	40	11/5/2007	12/26/2008	1,080.09	2,727.20	(1,647.11)
Foundation - TD	COVENTRY HEALTH CARE INC	540	2/12/2004	12/26/2008	7,344.81	14,858.40	(7,513.59)
Foundation - TD	RESERVE SHORT TERM INVT TR RESV YLD PLS	93.85	11/2/2007	12/30/2008	102.52	102.52	0.00
Foundation - TD	RESERVE SHORT TERM INVT TR RESV YLD PLS	142.51	12/4/2007	12/30/2008	155.67	155.67	0.00
Foundation - TD	RESERVE SHORT TERM INVT TR RESV YLD PLS	0.62	12/4/2007	1/16/2009	0.68	0.68	0.00
Foundation - TD	RESERVE SHORT TERM INVT TR RESV YLD PLS	0.6	12/4/2007	2/26/2009	0.66	0.66	0.00
Foundation - TD	RESERVE SHORT TERM INVT TR RESV YLD PLS	54.01	12/17/2007	2/26/2009	59.13	59.13	0.00
Foundation - TD	74254PZG0 PRIN LIFE INC 5.00	400	8/29/2008	9/15/2009	40,000.00	40,000.00	0.00
Foundation - TD	RESERVE SHORT TERM INVT TR RESV YLD PLS	17.71	12/17/2007	9/25/2009	19.39	19.39	0.00
TOTAL LONG TERM					104,823.45	155,060.90	(50,237.45)
OVERALL TOTAL					104,823.45	155,060.90	(50,237.45)

**The Richard Petritz Foundation  
Portfolio Value and Cost Basis - As of 9/30/2009**

Security	9/30/2009 Cost Basis	9/30/2009 FMV
<b>Bond</b>		
02635PRT2 AM GEN FIN 5 375	46,121 00	33,644 50
02635PTB9 AM GEN FIN 4 875	17,195 00	15,517 20
02635PTD5 AM GEN FIN 5 855	17,251 20	15,141 20
026874AX5 AM INTL GRP 5 05	17,308 20	14,820 80
060505CS1 BNK OF AM SR NOT 5 625	33,371 80	35,354 90
36966R2E5 GE CAP CORP 4 75	50,000 00	51,710 50
45974VB31 INTL LEASE FIN CORP 5 30	45,153 00	42,024 50
49327WAC6 KEYBNK NATL ASSN 5 50	48,188 50	51,586 00
55263ECJ2 MBNA CORP 5 0	27,990 00	29,643 00
59018YJ36 ML 6 05	49,303 00	53,324 50
61748AAE6 MORGAN STANLEY GLBL 4 75	15,919 92	17,867 16
802813AD7 SANTANDER SB NT 7 25	25,544 00	25,700 75
92976GAD3 WACHOVIA BANK 4 875	16,966 20	20,512 20
<b>TOTAL Bond</b>	<b>410,311 82</b>	<b>406,847 21</b>
<b>Mutual Fund</b>		
**DODGE & COX FUNDS INTERNATIONAL STOCK FUND	45,075 00	36,824 53
**MATTHEWS INDIA FUND	15,000 00	16,582 47
**MATTHEWS PACIFIC TIGER FUND	50,000 00	43,713 58
**VANGUARD INTERNATIONAL VALUEPORTFOLIO	45,075 00	35,638 99
HARBOR INTERNATIONAL GROWTH FUND	62,369 84	57,879 74
RESERVE SHORT TERM INVTR RESV YLD PLS	32 56	31 61
<b>TOTAL Mutual Fund</b>	<b>217,552 40</b>	<b>190,670 92</b>
<b>Stock</b>		
AMEDISYS INC	33,466 61	59,903 99
ANADARKO PETROLEUM CORP	15,591 00	37,638 00
AUTODESK INC	25,947 63	35,700 00
BAXTER INTL INC COM	33,453 68	32,381 68
CASCADE CORP COM	34,742 01	15,188 32
CENTURYTEL INC COM	39,321 23	29,030 40
CHEVRONTEXACO CORP	24,563 00	54,231 10
COLONIAL PROPERTIES TRUST	33,930 00	9,730 00
COMPUTER SCIENCES CORP	16,107 00	19,502 70
CUMMINS INC	36,121 35	77,073 20
DELPHI FINANCIAL GROUP INC CL A	15,483 00	13,578 00
DEVELOPERS DIVERSIFIED REALTY CORP	19,988 68	8,020 32
ENERGIZER HOLDINGS INC	17,636 00	26,536 00
INDIA FUND INC	25,048 91	15,483 65
INDYMAC BANCORP INC	16,367 00	47 25
JP MORGAN CHASE & CO COM	1,389 76	1,402 24
METHODE ELECTRS INC COM	37,508 59	25,377 09
MOOG INC-CL A	36,451 95	28,290 50
MOTOROLA INC	28,488 27	13,744 00
MYLAN LABORATORIES INC	36,164 75	28,058 15
NATIONWIDE HEALTH PROPERTIES INC	13,670 00	30,990 00
OLD REPUBLIC INTL CORP	14,658 00	9,135 00
ROYAL DUTCH SHELL PLC SPONSORED ADR REPSTG B SHS	22,038 00	28,833 09
SANDERSON FARMS INC COM	31,451 74	35,306 32
STANDARD & POORS DEPOSITORY RECEIPTS (SPDRS) (BOOK ENT)	165,631 29	132,515 45
USEC INC	10,960 00	9,380 00
WESTAR ENERGY INC	10,125 00	9,755 00
WESTERN DIGITAL CORP	30,793 95	58,448 00
<b>TOTAL Stock</b>	<b>827,098.40</b>	<b>845,279.45</b>
TD Money Market	231,058 62	231,058 62
<b>TOTAL TD Ameritrade Portfolio</b>	<b>1,686,021.24</b>	<b>1,673,856 20</b>
ML BANK DEPOSIT PROGRAM	730 94	730 94
<b>TOTAL PORTFOLIO VALUE</b>	<b>1,686,752.18</b>	<b>1,674,587 14</b>

- JP Morgan Chase Transaction on 6/2/08 see statement
- This Sheet corresponds with TD Ameritrade Cost Basis for bonds Quicken records the transaction but doesn't factor in "Accrued Interest" on the date of purchase Therefore, Quicken overstates the Bond Cost Basis

Application for Extension of Time To File an  
Exempt Organization Return

► 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 ►
- 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](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits

Type or print	Name of Exempt Organization	Employer identification number
File by the due date for filing your return. See instructions	THE RICHARD PETRITZ FOUNDATION	84-1523842
	Number, street, and room or suite no. If a P.O. box, see instructions PMB 342, 445C E. CHEYENNE MTN. BLVD	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. COLORADO SPRINGS, CO 80906	

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 RICHARD PETRITZ FOUNDATION - PMB 342, 445C E.**

- The books are in the care of ► CHEYENNE MTN BLVD - COLORADO SPRINGS, CO 80906
- Telephone No ► \_\_\_\_\_
- 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 MAY 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 OCT 1, 2008, and ending SEP 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	\$
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	\$
c <b>Balance Due.</b> 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	\$

**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

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

Form 8868 (Rev. 4-2009)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

<b>Part II Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed).		
<b>Type or print</b>	Name of Exempt Organization <b>THE RICHARD PETRITZ FOUNDATION</b>	Employer identification number <b>84-1523842</b>
<b>File by the extended due date for filing the return. See instructions.</b>	Number, street, and room or suite no. If a P.O. box, see instructions. <b>PMB 342, 445C E. CHEYENNE MTN. BLVD</b>	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>COLORADO SPRINGS, CO 80906</b>	

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

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

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**THE RICHARD PETRITZ FOUNDATION - PMB 342, 445C E.**

- The books are in the care of ► **CHEYENNE MTN BLVD - COLORADO SPRINGS, CO 80906**
- Telephone No. ► \_\_\_\_\_ 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 is for.

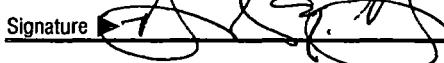
- I request an additional 3-month extension of time until **AUGUST 15, 2010**
- For calendar year **OCT 1, 2008**, and ending **SEP 30, 2009**
- If this tax year is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period
- State in detail why you need the extension

**ADDITIONAL TIME IS NECESSARY TO ACCUMULATE ALL OF THE DATA NECESSARY TO FILE A COMPLETE AND ACCURATE TAX RETURN.**

- 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. **8a** \$ — c —
- If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868. **8b** \$ — o —
- Balance Due.** Subtract line 8b from line 8a. 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. **8c** \$ — o —

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature  Title ► **CPA**

Date ► **5/11/10**

Form 8868 (Rev. 4-2009)