

# See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



## Form 990-PF

Department of the Treasury

## **Return of Private Foundation**

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

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

OMB No 1545-0052

G Check all that apply: Initial return Initial return of a former public charity Amended return Address change Name change  Use the IRS label THE PELLETIER FAMILY FOUNDATION, INC.	
Use the IRS Name of foundation  A Employer identification number	
USE THE INTERPRETATION FOR THE TOTAL	
MUR DRIIRMIRD RAMIIV ROIMDAMIONI ING	
label THE PELLETTER FAMILY FOUNDATION, INC.	
Otherwise, C/O LISA PELLETIER FEKETE 06-1604304	
print Number and street (or PO box number if mail is not delivered to street address) Room/suite B Telephone number	
or type. 330 TALMADGE ROAD 203 271 2467 See Specific City or town state and 7/D code	
Instructions   City Ut (UWI), State, and ZIF Code	
CHESHIRE, CT U6410-2929 P 1 Foreign organizations, check he	e D
H Check type of organization:  X Section 501(c)(3) exempt private foundation  2. Foreign organizations meeting the 85 check here and attach computation	• test,
Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation  E If private foundation status was te	
I Fair market value of all assets at end of year J Accounting method: X Cash Accrual under section 507(b)(1)(A), check	
(from Part II, col. (c), line 16)  Other (specify)  (Part I, column (d) must be on cash basis.)  F If the foundation is in a 60-month under section 507(b)(1)(B), check	
D. 4.1 Applysis of Daysays and Evanges	sbursements
(The total of amounts in columns (b), (c), and (d) may not avanges per hooks	table purposes basis only)
1 Contributions, gifts, grants, etc., received N/A	Dasis only,
2 Check X if the foundation is not required to attach Sch B	··
3 Interest on savings and temporary cash investments	
4 Dividends and interest from securities 15949. 15949. STAT	MENT 1
5a Gross rents	
b Net rental income or (loss)	
6a Net gain or (loss) from sale of assets not on line 10 -3819.	
b Gross sales price for all 83203. 7 Capital gain net income (from Part IV, line 2)  O . RECEIVED	
7 Capital gain net income (from Part IV, line 2)	
8 Net snort-term capital gain	<b>်</b>
9 Income modifications Gross sales less returns  WAR 2 9 2010	C
10a and allowances	ě
b Less Cost of goods sold	_ د
c Gross profit or (loss)	1
11 Other income 12 Total. Add lines 1 through 11 12130 15949 1	
13 Compensation of officers, directors, trustees, etc 0. 0.	0.
14 Other employee salaries and wages	
15 Pension plans, employee benefits	
% 16a Legal fees	
	0.
b Accounting fees STMT 2 c Other professional fees STMT 3 6406.  17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses STMT 4 24 Total operating and administrative expenses. Add lines 13 through 23  C Occupancy 25 Other expenses STMT 4 26 Occupancy 27 Total operating and administrative expenses. Add lines 13 through 23	0.
9 17 Interest	
Taxes 18 Taxes	
19 Depreciation and depletion	
E 20 Occupancy	
21 Travel, conferences, and meetings	
22 Printing and publications	
23 Other expenses STMT 4 115. 0.	0.
24 Total operating and administrative expenses. Add lines 13 through 23 7316.	0
expenses. Add lines 13 through 25 7310. 0. 25 Contributions, gifts, grants paid 6000.	6000.
26 Total expenses and disbursements.	
Add lines 24 and 25 13316. 0.	6000.
27 Subtract line 26 from line 12:	
a Excess of revenue over expenses and disbursements -1186.	
b Net investment income (if negative, enter -0-)	
c Adjusted net income (if negative, enter -0-)	

Form **990-PF** (2009)

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THE PELLETIER FAMILY FOUNDATION, INC.

•	THE PELLETIER FAMILY FOUNDATION, INC.		
Form 990-PF (2009)	C/O LISA PELLETIER FEKETE	06-1604304	Page 2
	Attrached eshedules and arrounts in the description Beginning of year	End of year	

Cash - non-merset-bearing	Г		Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	year
2 Saveyas and temporary cash investments    Accounts receivable   Less: allowance for doubtful accounts   Less: allowance for allowance for doubtful accounts   Less: allowance for allowance for doubtful accounts   Less: allowance for doubtful ac		art	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
a Accounts recevable ► Less allowande for doubtful accounts ►  4 Pedges recevable ► Less allowande for doubtful accounts ►  5 Genats recevable ► Less allowande for doubtful accounts ►  6 Recovables due from officers, directors, fursites, and other disqualified persons  7 diversiments in the first of the competent of the first of the competent		1	Cash - non-interest-bearing			
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Less: allowance for doubtful accounts			disqualified persons			
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Prepared expenses and deferred charges 10a Investments - U.S. and state government obligations b Investments - corporate blook c Investments - corporate bloo		İ	Less: allowance for doubtful accounts ▶			
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3 Other increases not included in line 2 (itemize) ►  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize) ►  5 Decreases not included in line 2 (itemize) ►  6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30  3 Other increases not included in line 2 (itemize) ►  5 Other increases not included in line 2 (itemize) ►  6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30					<del></del>	
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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 82185.						
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 682185.						
				umn (h) line 30		
	<u>.                                    </u>	ivial	THE GOSCIS OF TURBU DELETIONS AT BITO OF YEAR THE STORE STORE STORE THE COL	unin (D), iine 30	6	

06-1604304

Page 3

		he kind(s) of property sold (e.g use; or common stock, 200 sh			( <b>b)</b> Hov P - P D - D	v acquired urchase lonation	(c) Date a (mo., da	acquired ay, yr.)	(d) Date sold (mo., day, yr.)
1a		<u> </u>							
b SEE A	TTACHED S'	<u> PATEMENT</u>							
<u>d</u>		<del> </del>							
<u>e</u>			<del></del>	<del>-</del>	Ц,				
(e) Gross sa	les price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				ain or (loss) s (f) minus (	
<u>a</u>					_				
<u>b</u>									
<u>C</u>						_			
<u>d</u>	00000			0.000	_				2010
<u>e</u>	83203.		4b - 4 d-1	8702	2.				-3819.
Complete only f	or assets showing gai	in in column (h) and owned by	1					ol. (h) gaın ıot less thar	
(i) F.M.V. as o	f 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (i) col. (j), if any			Losses	(from col. (	h)) 
_a						_			
<u>_b</u>									
<u> </u>									
<u>d</u>									
<u>e</u>			<u> </u>						-3819.
2 Capital gain net i	ncome or (net capital	loss) { If gain, also enter of the loss of	r ın Part I, line )- ın Part I, line	7 7	} [	<u>,                                    </u>			-3819.
3 Net short-term ca	apital gain or (loss) as	defined in sections 1222(5) ar							
	r ın Part I, line 8, colur		(-).		] [				
If (loss), enter -0		er Section 4940(e) for			خللة	3		N/A	
		ndations subject to the section of	4940(a) tax or	net investment in					
If section 4940(d)(2) Was the foundation If "Yes," the foundation	) applies, leave this pa liable for the section 4 on does not qualify ur	art blank. 1942 tax on the distributable am nder section 4940(e). Do not co	nount of any yo	ear in the base per art.	come.)				Yes X No
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If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the approp  Base p  Calendar year (or	) applies, leave this particular for the section 4 on does not qualify understate amount in each (a) eriod years tax year beginning in 2008	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying dis	nount of any younglete this particularly before stributions	ear in the base per art. : making any entrie	come.) riod? es. (c) ncharita	ble-use assets	3.	Distrib (col. (b) div	(d) ution ratio ided by col. (c)) .069440
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If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the approp  Calendar year (or	) applies, leave this partial liable for the section 4 on does not qualify urbriate amount in each (a) eriod years tax year beginning in 2008	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying dis	nount of any younglete this paractions before stributions $\frac{58325}{59424}.$	ear in the base per art. : making any entrie	come.) riod? es. (c) ncharita	839938 030104 943400	3 . 1 .	Distrib (col. (b) div	(d) ultion ratio ided by col. (c)) .069440 .057687
If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the appropriate the propriate that t	) applies, leave this partial liable for the section 4 on does not qualify urbrate amount in each (a) eriod years tax year beginning in 2008	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying dis	nount of any younglete this paructions before stributions $\frac{58325}{59424}.$ $43362.$ $52380.$	ear in the base per art. : making any entrie	come.) riod? es. (c) ncharita	839938 030104 943400 93407	3 . 1 . 0 .	Distrib (col. (b) div	(d) ultion ratio ided by col. (c))  . 069440 . 057687 . 045964 . 056077
If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the appropriate the propriate that t	) applies, leave this partial liable for the section 4 on does not qualify urbriate amount in each (a) eriod years tax year beginning in 2008	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying dis	nount of any younglete this paractions before stributions $\frac{58325}{59424}.$	ear in the base per art. : making any entrie	come.) riod? es. (c) ncharita	839938 030104 943400	3 . 1 . 0 .	Distrib (col. (b) div	(d) ultion ratio ided by col. (c)) .069440 .057687
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If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the approp  Calendar year (or  2  2  2  Total of line 1, co  3 Average distribut	) applies, leave this particular for the section 4 on does not qualify under the secti	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying distributed for the section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying distributed for the section (c)	mount of any year property this particular stributions $\frac{58325}{59424}$ $\frac{43362}{52380}$	ear in the base per art. making any entric Net value of no	come.) nod? es. (c) ncharita	839938 030104 943400 93407 865034	3 . 1 . ) . 7 .	Distrib (col. (b) div	(d) ultion ratio ided by col. (c))  . 069440 . 057687 . 045964 . 056077
If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the approp  Calendar year (or  2  2  2  2  2  2  2  2  3  Average distribut the foundation has	liable for the section 4 on does not qualify ur prate amount in each (a)	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying distributed for the section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying distributed for the section (c)	nount of any younglete this paructions before stributions  58325. 59424. 43362. 52380. 48679.	ear in the base per art. making any entric Net value of no	come.) nod? es. (c) ncharita	839938 030104 943400 93407 865034	3 . 1	Distrib (col. (b) div	(d) ution ratio ided by col. (c))  . 069440 . 057687 . 045964 . 056274
If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the approp  Calendar year (or  2  2  2  2  2  2  2  2  3  Average distribut the foundation has	) applies, leave this particularly applies, leave this particular for the section 4 on does not qualify urbriate amount in each (a) eriod years tax year beginning in 2008 2007 2006 2005 2004 2001 as been in existence if the of noncharitable-us	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying distributed qualifying	nount of any younglete this paructions before stributions  58325. 59424. 43362. 52380. 48679.	ear in the base per art. making any entric Net value of no	come.) nod? es. (c) ncharita	839938 030104 943400 93407 865034	3 . 1	Distrib (col. (b) div	(d) ultion ratio ided by col. (c))  . 069440 . 057687 . 045964 . 056077 . 056274 . 285442
If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the approp  Calendar year (or  2  2  2  Total of line 1, co  3 Average distribut the foundation has  4 Enter the net valu  5 Multiply line 4 by	) applies, leave this particularly applies, leave this particular for the section 4 on does not qualify urbriate amount in each (a) eriod years tax year beginning in 2008 2007 2006 2005 2004 2001 as been in existence if the of noncharitable-us	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying distributed qualifying distributed see period - divide the total of less than 5 years  the assets for 2009 from Part X,	nount of any younglete this paructions before stributions  58325. 59424. 43362. 52380. 48679.	ear in the base per art. making any entric Net value of no	come.) nod? es. (c) ncharita	839938 030104 943400 93407 865034	3	Distrib (col. (b) div	(d) ution ratio ided by col. (c))  . 069440 . 057687 . 045964 . 056274 . 285442 . 057088 640009.
If section 4940(d)(2  Was the foundation  If "Yes," the foundati  Enter the approp  Calendar year (or  2  2  2  Total of line 1, co  3 Average distribut the foundation has  4 Enter the net valu  5 Multiply line 4 by	liable for the section 4 on does not qualify ur prate amount in each (a)	art blank.  1942 tax on the distributable amoder section 4940(e). Do not cocolumn for each year; see instruction (b)  Adjusted qualifying distributed qualifying distributed see period - divide the total of less than 5 years  the assets for 2009 from Part X,	nount of any younglete this paructions before stributions  58325. 59424. 43362. 52380. 48679.	ear in the base per art. making any entric Net value of no	come.) nod? es. (c) ncharita	839938 030104 943400 93407 865034	3	Distrib (col. (b) div	(d) ultion ratio ided by col. (c))  . 069440 . 057687 . 045964 . 056077 . 056274 . 285442 . 057088 640009. 36537.
If section 4940(d)(2) Was the foundation If "Yes," the foundati 1 Enter the appropriate the appropriate to a section of the foundation has a section of the foundation of the foundation has a section of the foundation of the foundation has a section of the foundation of the foundati	liable for the section 4 on does not qualify ur prate amount in each (a)	r base period - divide the total of less than 5 years  e assets for 2009 from Part X,  of Part I, line 27b)	nount of any younglete this paructions before stributions  58325. 59424. 43362. 52380. 48679.	ear in the base per art. making any entric Net value of no	come.) nod? es. (c) ncharita	839938 030104 943400 93407 865034	3	Distrib (col. (b) div	(d) ution ratio ided by col. (c))  . 069440 . 057687 . 045964 . 056077 . 056274 . 285442 . 057088

THE PELLETIER FAMILY FOUNDATION, INC. Form 990-PF (2009) C/O LISA PELLETIER FEKETE 06-1604304 Page 4 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 \( \bigs \) and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary-see instructions) **b** Domestic foundations that meet the section 4940(e) requirements in Part V, check here 319. 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) Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Add lines 1 and 2 3 319. Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 0. 319. Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-5 Credits/Payments: a 2009 estimated tax payments and 2008 overpayment credited to 2009 6a 425. b Exempt foreign organizations - tax withheld at source 6b c Tax paid with application for extension of time to file (Form 8868) 6¢ d Backup withholding erroneously withheld 6d 425. 7 Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here \_\_\_\_\_ if Form 2220 is attached Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 106. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 106. Refunded Enter the amount of line 10 to be: Credited to 2010 estimated tax ο. 11 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 X any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b 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. c Did the foundation file Form 1120-POL for this year? X 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0 . (2) On foundation managers. ▶ \$ (1) On the foundation. > \$ 0. 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? 2 Х 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 X bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 3 Х 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 Х 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? 6 X X 7 Did the foundation have at least \$5,000 in assets at any time during the year? 7 If "Yes," complete Part II, col. (c), and Part XV 8a Enter the states to which the foundation reports or with which it is registered (see instructions) CT b 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 8b X 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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

Form **990-PF** (2009)

THE PELLETIER FAMILY FOUNDATION, INC. Form 990-PF (2009) Page 5 C/O LISA PELLETIER FEKETE 06-1604304 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) X 11 12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? X 12 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 13 Website address N/A Telephone no. ▶ 203 271 2467 14 The books are in care of ▶ LISA PELLETIER FEKETE Located at ▶ 330 TALMADGE ROAD, CHESHIRE, CT ZIP+4 ▶06410-2929 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 N/A Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. Yes 1a During the year did the foundation (either directly or indirectly); Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes 🗶 No a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available 🗌 Yes 🕱 No for the benefit or use of a disqualified person)? (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 Yes X No termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations N/A section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 1b Organizations relying on a current notice regarding disaster assistance check here 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 2009? X 1c 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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning Yes X No before 2009? 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 instructions.) N/A2b 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

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

Form 4720, to determine if the foundation had excess business holdings in 2009.)

had not been removed from jeopardy before the first day of the tax year beginning in 2009?

b If "Yes," did it have excess business holdings in 2009 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,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form **990-PF** (2009)

X

3b

4a

Yes X No

N/A

during the year?

THE PELLETIER FAMILY FOUNDATION, INC. C/O LISA PELLETIER FEKETE 06-1604304 Form 990-PF (2009) Page 6 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes X No Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A 5b section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 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 Yes No N/A expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? 6Ь X b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 7b b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? Information About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors List all officers, directors, trustees, foundation managers and their compensation. (c) Compensation (e) Expense account, other (d) Contributions to (b) Title, and average ployee benefit plans and deferred compensation hours per week devoted to position (If not paid, (a) Name and address allowances LISA A. (PELLETIER) FEKETE PRESIDENT TREASURER 330 TALMADGE ROAD 0 0 0. CHESHIRE, CT 064102919 0.00 SECRE|TARY VICE PRESIDENT / LOUISE M. PELLETIER 143 LARKSPUR LANE BRISTOL, CT 060108937 0. 0.00 0 0 LYNN M. (PELLETIER) SPENCER VICE PRESIDENT PO BOX 545 ASCUTNEY, VT 05030 0.00 0 0 0. 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (e) Expense account, other (b) Title, and average (a) Name and address of each employee paid more than \$50,000 hours per week devoted to position (c) Compensation allowances NONE

Total number of other employees paid over \$50,000

Form **990-PF** (2009)

### THE PELLETIER FAMILY FOUNDATION, INC.

Form 990-PF (2009) C/O LISA PELLETIER FEKETE	06-1	L604304 Page 7
Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)	tion Managers, Highly	-
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  Part IX-A   Summary of Direct Charitable Activities		▶ 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers produced.		Expenses
1 <u>N/A</u>		
2		<del></del>
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 <u>N/A</u>		
2		
All other program related investments Con instructions		
All other program-related investments. See instructions.  3		

Form **990-PF** (2009)

0.

Total. Add lines 1 through 3

Page 8

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	indations, see	instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	649755.
b	Average of monthly cash balances	1b	
C	Fair market value of all other assets	1c	
đ	Total (add lines 1a, b, and c)	1d	649755.
е	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	649755.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	9746.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	640009.
6	Minimum investment return. Enter 5% of line 5	6	32000.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a foreign organizations check here  and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	32000.
2a	Tax on investment income for 2009 from Part VI, line 5		
ь	Income tax for 2009. (This does not include the tax from Part VI.)	1	
C	Add lines 2a and 2b	7 2c	319.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	31681.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	31681.
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	31681.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		6000
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	6000.
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:	1 . 1	
а	Surtability test (prior IRS approval required)	3a	
þ	Cash distribution test (attach the required schedule)	3b	<u> </u>
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	6000.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6000.
	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

Form **990-PF** (2009)

4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI,				21601
_	line 7				31681.
_	Undistributed income, if any, as of the end of 2009  a Enter amount for 2008 only			0.	
	b Total for prior years:				
,	y rotal for prior years.		0.		
3	Excess distributions carryover, if any, to 2009:		<b></b>		
	a From 2004				
	b From 2005 2539.				
-	c From 2006				
	d From 2007 9071.				
-	e From 2008 16678.				
1	f Total of lines 3a through e	28288.			
4	Qualifying distributions for 2009 from				
	Part XII, line 4: ► \$ 6000.				
	a Applied to 2008, but not more than line 2a			0.	
	<b>b</b> Applied to undistributed income of prior				
	years (Election required - see instructions)		0.	<del></del>	
•	c Treated as distributions out of corpus	_			
	(Election required - see instructions)	0.			
-	d Applied to 2009 distributable amount				6000.
-	e Remaining amount distributed out of corpus	0.			
5	Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	25681.			25681.
6	Enter the net total of each column as indicated below:				
	2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	2607.			
	b Prior years' undistributed income. Subtract				
	line 4b from line 2b		0.		
	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 2008. Subtract line			_	
	4a from line 2a. Taxable amount - see instr.			0.	
1	f Undistributed income for 2009. Subtract				
	lines 4d and 5 from line 1. This amount must				
	be distributed in 2010				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 2004		ļ		
	not applied on line 5 or line 7	0.			
9	Excess distributions carryover to 2010.				
	Subtract lines 7 and 8 from line 6a	2607.			
	Analysis of line 9:				
	Excess from 2005				
	Excess from 2006				
	Excess from 2007				
	1 Excess from 2008 2607.				
	Excess from 2009				

THE PELLETIER FAMILY FOUNDATION, INC. Form 990-PF (2009) C/O LISA PELLETIER FEKETE Page 10 06-1604304 Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 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 2009, 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(1)(5) Prior 3 years Tax year 2 a Enter the lesser of the adjusted net (a) 2009 (c) 2007 (b) 2008 (d) 2006 (e) Total income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a 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 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 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.) 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 \( \bigcup \leftarrow 
a The name, address, and telephone number of the person to whom applications should be addressed

#### LISA PELLETIER FEKETE

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

LETTER STATING PURPOSE OF ORGANIZATION; PROOF OF IRS TAX EXEMPT STATUS

c Any submission deadlines:

### NONE

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

#### NONE

Form 990-PF (2009) C/O LISA PELLETIER FEKETE

Part XV | Supplementary Information (continued)

06-1604304

O Control Cont				<del>-</del>
3 Grants and Contributions Paid During the Yo	If recipient is an individual	Payment		<del></del>
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	Purpose of grant or contribution	Amount
a Paid during the year MT ASCUTNEY HOSPITAL PO BOX 279 ASCUTNEY, VT 05030	or substantial contributor  NONE	recipient	SCHOOL PROGRAMS	3000.
SHRINERS HOSPITALS FOR CHILDREN 516 CAREW STREET SPRINGFIELD, MA 011042396	NONE		HOSPITAL CARE FOR NEEDY CHILREN	3000.
Total	Т	1	▶ 3a	6000.
<b>b</b> Approved for future payment				
NONE				
Total			<b>▶</b> 3b	0.

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C/O LISA PELLETIER FEKETE

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Part XVI-A	Analysis	of Income-	-Producina	Activities
Lait VAI.V		Or income	- i caaciiig	ACHTIGGS

	s amounts unless otherwise indicated.			77		(e)
Ū	n service revenue:	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
a						
b						
c						
f	<del>-                                    </del>					
a Fees	and contracts from government agencies					
	rship dues and assessments					
	on savings and temporary cash					
investm						
	ds and interest from securities			1		15949.
-	tal income or (loss) from real estate:					13747.
	t-financed property					
	debt-financed property			1		
	tal income or (loss) from personal			<del> </del>		<del></del>
propert	•	-		+		
	vestment income			┿	-	
	(loss) from sales of assets other					2010
than inv	<del>-</del>			-		
	ome or (loss) from special events	ļ				
•	rofit or (loss) from sales of inventory			-		<del></del>
11 Other re	evenue:					
				-		<u> </u>
				-		
c		-		-		
				1		
				<del> </del>	1	
e						10120
e 2 Subtota	I. Add columns (b), (d), and (e)		0.		0.	
e 2 Subtota 3 Total. A	I. Add columns (b), (d), and (e) add line 12, columns (b), (d), and (e)		0		0.	
e 2 Subtota 3 Total. A See works	I. Add columns (b), (d), and (e) add line 12, columns (b), (d), and (e) heet in line 13 instructions to verify calculations.)	a the Ass			13	
e2 Subtota 3 Total. A See works Part X	II. Add columns (b), (d), and (e)  add line 12, columns (b), (d), and (e)  heet in line 13 instructions to verify calculations.)  VI-B  Relationship of Activities t		omplishment of E	xemp	13 ot Purposes	12130.
e2 Subtota 3 Total. A See works Part X	II. Add columns (b), (d), and (e)  add line 12, columns (b), (d), and (e)  heet in line 13 instructions to verify calculations.)  VI-B  Relationship of Activities t  Explain below how each activity for which inco	me is reported	omplishment of E.	xemp	13 ot Purposes	12130.
e2 Subtota 3 Total. A See works Part X Line No.	I. Add columns (b), (d), and (e)  Add line 12, columns (b), (d), and (e)  heet in line 13 instructions to verify calculations.)  VI-B  Relationship of Activities t  Explain below how each activity for which inco the foundation's exempt purposes (other than	me is reported by providing fu	omplishment of E	<b>xemp</b> A contril	13  of Purposes  buted importantly to the accom	12130.
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e2 Subtota 3 Total. A See works Part X Line No.  ▼ 4,8	I. Add columns (b), (d), and (e)  Add line 12, columns (b), (d), and (e)  heet in line 13 instructions to verify calculations.)  VI-B Relationship of Activities t  Explain below how each activity for which inco the foundation's exempt purposes (other than AMOUNTS ARE INVESTMENT	me is reported by providing fu INCOME	omplishment of E	<b>xemp</b> A contril	13  of Purposes  buted importantly to the accom	
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THE PELLETIER FAMILY FOUNDATION, INC. Form 990-PF (2009) C/O LISA PELLETIER FEKETE 06-1604304 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No 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? Transfers from the reporting foundation to a noncharitable exempt organization of: X (1) Cash 1a(1) (2) Other assets 1a(2) X **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization X 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) (4) Reimbursement arrangements X 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 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. (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described X No in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes b If "Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship N/A

Under penalties of pe nry, I declare that L ave examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct. than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

3/24 Signature of officer or trustee

PRESIDENT

Check if selfemployed > Preparer's identifying number

signature BARDAGLIO, HART & SHUMAN, LLC Firm's name (or yours 594 NORTH STREET, PO BOX 546 ıf setf-employed), address, and ZIP code WINDSOR LOCKS, CT 06096-0546

Phone no.

EIN ▶

(860)627-9001

Sign Here

Preparer's

r	Cartie   Capital Gains and Lo	sses for fax on investment income				
	(a) List and	d describe the kind(s) of property so rick warehouse; or common stock, 2	old, e.g., real estate,	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	325 APOLLO GRO	UP			04/02/08	
b	1250 CORINTHIA	N COLLEGES			07/07/05	
C	200 TJX COS				03/03/04	
_d	800 TJX COS				09/30/05	
е	1020 WYNHDAM W	ORLWIDE		P	07/31/06	06/18/09
f	BANK OF AMERIC	A - CASH IN LIEU	J	P		
g						
h						
1						
k	<del></del>					
_1	<del></del>					
m	<u> </u>					
n						
0						
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) (e) p	Gain or (loss) lus (f) minus (g)	
a	28342.		14513.			13829.
b	24044.		16246.			7798.
С	3906.		4701.			<del>-795.</del>
<u>d</u>	15624.		16570.			-946.
е	11279.		34992.			-23713.
f	8.					8.
g						
h			<del>                                     </del>			
1	<del></del>					
<u>,</u>					_ <del></del>	
<u>k</u>			-		<del></del>	
<u> </u>						
m			<del>                                     </del>			
<u>n</u> o	, ,		<del> </del>			
0	Complete only for assets showing	ı 1g gain in column (h) and owned by	the foundation on 12/31/69	//\ Loc	ses (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	Gains (excess o	of col. (h) gain over ot less than "-0-")	col. (k),
2			over the time (gg in the g			13829.
a b			<del>                                     </del>			7798.
C	. =					-795 <b>.</b>
d				·		-9 <b>4</b> 6.
e				<del></del>	<del></del>	-23713.
f					-	8.
g		<del></del>				
h						
ı					-	
1.					<u></u>	
k						
L				·		
m						
n						
0						
,	Capital gain net income or (net ca	ipital loss) {   If gain, also ente	r in Part I, line 7 D-" in Part I, line 7	2		-3819.
				-	<del></del>	
	Net short-term capital gain or (los If gain, also enter in Part I, line 8, If (loss), enter "-0-" in Part I, line 8	ss) as defined in sections 1222(5) ar column (c). 3	na (6):	2	N/A	
	Unit until lille L	•	, ,	o i	IN / M	

FORM 990-PF DIVIDEND	OS AND	INTER	EST FROI	M SECUI	RITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		TAL GAINS	COLUMN (A)	)
WELLS FARGO ADVISORS	•	_	15949		0.	159	49.
TOTAL TO FM 990-PF, PART I, I	.n 4		15949	•	0.	1594	49.
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	2
DESCRIPTION	EXPE		NET IN	/EST-	(C) ADJUSTED NET INCOM	(D) CHARITAI E PURPOSI	
ACCOUNTING		795.		0.			0.
TO FORM 990-PF, PG 1, LN 16B		795.		0.			0.
FORM 990-PF C	THER	PROFES	SIONAL 1	FEES		STATEMENT	3
DESCRIPTION	EXPE		(B NET IN MENT I	/EST-	(C) ADJUSTED NET INCOM	CHARITAI	
INVESTMENT FEES		6406.		0.			0.
TO FORM 990-PF, PG 1, LN 16C =	=	6406.		0.			0.
FORM 990-PF	0	THER E	XPENSES			STATEMENT	4
DESCRIPTION	EXPE	A) NSES BOOKS	(B NET IN MENT II	/EST-	(C) ADJUSTED NET INCOM		
OFFICE EXPENSE		115.		0.			0.
TO FORM 990-PF, PG 1, LN 23		115.		0.			0.

FORM 990-PF CORPORATE STOCK		STATEMENT 5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
WELLS FARGO #5022-1365	659125.	710012.
TOTAL TO FORM 990-PF, PART II, LINE 10B	659125.	710012.