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Department of the Treasury
Internal Revenue Service

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

2009

OMB No 1545-0052

Foi	r calendar year 2009, or tax year beginning , and ending											
G	Chec	k all ti	hat apply	Initial	return	Initial return of a for	mer public chai	rity	Fir	al returr	<u> </u>	
				Amen	nded return	Address change	□ Na	me c	change			
U	se the	IRS	Name of foundation	_ 				A	Employer identificati	on numbe		
	labe		The Peternell Fa		dation				• •	3864384		
0	therv	/ise,				elivered to street address)	Room/suite	l _R -	Telephone number (se			ructions)
	prin		1		1 Silverside Roa		123			839-175		,
	or typ		City or town, state,		1 Oliverside Moa	<u>. </u>	1 125		f exemption application			
	e Spe struct		Wilmington	ana 211 0000		DE	19809-1377		i exemption application 1. Foreign organization			
_			of organization	Section	on 501(c)(3) eye	mpt private foundation		1	• •			
Ö						Other taxable private		'	Foreign organization check here and attait	_		st, ▶□
干					<u> </u>				f private foundation sta	atus was te	erminated	. 🗀
			t value of all asse m Part II, col. (c)		J Accounting i		n		under section 507(b)(1			ੑ ▶ ∟
		6) >		, 1 775 47∩	(Part I, column (d) must be on cash bas	us)		f the foundation is in a inder section 507(b)(1			` ▶□
Pa	rt I	Anal	ysis of Revenue		•		<u> </u>	<u></u>	T T		(d) Disburse	ements
			its in columns (b), (c),	=	· ·	(a) Revenue and expenses per	(b) Net investm	ent	(c) Adjusted ne		for charite	
			nounts in column (a) (s			books	ıncome		income		purpose	
	1	Contat	outrone aufte arante e	ate received (attach schadula)					_	(cash basis	s Offig)
	2		outions, gifts, grants, ∈ X if the foundation						<u> </u>			
	3		st on savings and t									
	4		ends and interest fr			76,140	50).492	2	_		
	5 a	Gross				, 0, 1.10		,				
	b	Net re	ental income or (los	ss)								
۱			ain or (loss) from s		not on line 10	53						
Revenue	_	_	sales price for all asse									
É	7	Capita	al gain net income	(from Part IV	/, line 2)			53	3			
-	8		hort-term capital ga		·							
	9	Incom	ne modifications									
	10 a	Gross	sales less returns and	dallowances								}
	b	Less	Cost of goods sole	d					REC	-13/5	\equiv	
			profit or (loss) (att		e)					SIVE		
	11		income (attach scl	•					190 1000			
	12		. Add lines 1 throu	<u>-</u>		76,193	50) ₁ 545	5 MAY 1	<u> 0</u> 201	미양	
Expenses	13	•	ensation of officers	-	trustees, etc				# 4			
Su	14		employee salaries	•						NIR		
g	15 16 a		on plans, employed fees (attach sched							- 0)		
			unting fees (attach		•							
tive			professional fees	•	· Aula\	9,628		9,628	R .			
ati	17	intere	•	(attach scho	auic,	3,020		<i>,,</i> 020	9	_		
stı	17 18 19 20 21		(attach schedule) (see	page 14 of the	e instructions)	-23						
<u>=</u>	19		eciation (attach sch									
늉	20	Occup	pancy	,	•							
Ž	21	Trave	l, conferences, and	d meetings								
and	22	Printir	ng and publications	3								
9	23	Other	expenses (attach	schedule)		13,191						13,191
ti	24	Total	operating and ad	ministrative	expenses.							
e e			nes 13 through 23			22,796		9,628	8	_		<u> 13,191</u>
Operating	25		ibutions, gifts, gran	•		83,000						83,000
	26		expenses and disbui		lines 24 and 25	105,796	9	9,628	Β	_		96,191
	27		act line 26 from line									
			s of revenue over ex	•		29,603				$-\!$		
			vestment income				40),917	/	$-\!$!
	c	Adjus	sted net income (i	r negative, ei	nter -0-)							

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. (HTA)

Form **990-PF** (2009)

Da	rt II	Ralance Sheets Attached schedules and amounts in the description column	Beginning of year	End o	nd of year	
	التحد	should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value	
	1	Cash—non-interest-bearing				
	2	Savings and temporary cash investments	72,430	61,303	61,303	
	3	Accounts receivable				
		Less allowance for doubtful accounts				
	4	Piedges receivable				
		Less allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other				
		disqualified persons (attach schedule) (see page 15 of the instructions)				
	7	Other notes and loans receivable (attach schedule)		.	*	
رم	'	_				
Assets	8	Less allowance for doubtful accounts Inventories for sale or use				
155	9	Prepaid expenses and deferred charges		-		
Q		a Investments—U S and state government obligations (attach schedule)	693,311	547,364	571,688	
		b Investments—corporate stock (attach schedule)	901,631	1,029,102	1,142,479	
		c investments—corporate bonds (attach schedule)	001,001	1,020,102	1,172,710	
	11	Investments—land, buildings, and equipment basis				
	''	Less accumulated depreciation (attach schedule)				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment basis				
	'-					
	15	Less accumulated depreciation (attach schedule) Other assets (describe				
	16	Total assets (to be completed by all filers—see the			· · · · · · · · · · · · · · · · · · ·	
	.*	instructions Also, see page 1, item I)	1,667,372	1,637,769	1,775,470	
	17	Accounts payable and accrued expenses	.,,,,,,,,	1,007,100	1,710,170	
	18	Grants payable				
<u>e</u>	19	Deferred revenue				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				
ap	21	Mortgages and other notes payable (attach schedule)				
Ξ	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)	0	0		
		Foundations that follow SFAS 117, check here		-		
Ś		and complete lines 24 through 26 and lines 30 and 31.		•		
ၓၟ	24	Unrestricted				
alances	25	Temporarily restricted				
a	26	Permanently restricted	, ,			
or Fund B		Foundations that do not follow SFAS 117, check here				
Ē		and complete lines 27 through 31.				
5	27	Capital stock, trust principal, or current funds .				
Š	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
Se	29	Retained earnings, accumulated income, endowment, or other funds	1,667,372	1,637,769		
As	30	Total net assets or fund balances (see page 17 of the				
Net Assets		instructions)	1,667,372	1,637,769		
Z	31	Total liabilities and net assets/fund balances (see page 17				
		of the instructions)	1,667,372	1,637,769		
	rt III	Analysis of Changes in Net Assets or Fund Balances				
1		net assets or fund balances at beginning of yearPart II, column (a), line	30 (must agree with			
		of-year figure reported on prior year's return) .		1	1,667,372	
		r amount from Part I, line 27a		2	-29,603	
				3	0	
		ines 1, 2, and 3		4	1,637,769	
					0	
6	Total	net assets or fund balances at end of year (line 4 minus line 5)—Part II, c	olumn (b), line 30	6	1,637,769	

Part IV Capital Gains an	<u>d Losses for Tax on Inve</u>	<u>estme</u>	ent Incor	me			
	kind(s) of property sold (e.g., real es se, or common stock, 200 shs MLC ((b) How acquired P—Purchase D—Donation	1 ''	Date acquired io , day, yr)	(d) Date sold (mo , day, yr)
1a Pùblicly-traded Securities				Р	Vario	JS	Various
b					T		
С							
d							
e	<u> </u>				<u> </u>		
(e) Gross sales price	(f) Depreciation allowed (or allowable)			r other basis ense of sale			ain or (loss) (f) minus (g)
a 845,461				845,408			53
b					<u> </u>		
С					ļ		
d		ļ			ļ		
е					ļ		
Complete only for assets show	ing gain in column (h) and owne	d by th	e foundation	on on 12/31/69	1	(I) Gains (C	ol (h) gain minus
(i) F M ∨ as of 12/31/69	(j) Adjusted basis as of 12/31/69			ss of col (ı) I (j), ıf any			ot less than -0-) or (from col (h))
a	<u> </u>						
b							
С					<u> </u>		
d							
e					Ļ		
2 Capital gain net income or (rt I, line 7 rt I, line 7	2		53
3 Net short-term capital gain of	or (loss) as defined in section	ns 122	2(5) and	(6)			
-	ine 8, column (c) (see pages	3 13 an	d 17 of t	he }	1 1		
instructions) If (loss), enter				J	3		_
Part V Qualification Und	er Section 4940(e) for R	educe	<u>ed Tax o</u>	<u>n Net Investm</u>	ent In	come	
(For optional use by domestic p	rivate foundations subject to	the se	ection 494	40(a) tax on net ii	nvestm	ent income)
If section 4940(d)(2) applies, lea	ave this part blank						
Was the foundation liable for the	•	stributs	hle amoi	int of any year in	the ha	se neriod?	☐ Yes X No
If "Yes," the foundation does no				• •	ine be	oc periou.	
					4. a.a.a. la		
	ount in each column for each	year,	see page	18 of the instruc	tions b	erore makin	
(a) Base period years	(b)			(c)		Di	(d) stribution ratio
Calendar year (or tax year beginning in	Adjusted qualifying distribution	ons	Net value	of nonchantable-use a	assets		divided by col (c))
2008	10	4,966		1,928	8,677		0 054424
2007	5	5,908		2,128	8,042		0 026272
2006		4,998		1,708	8,465		0 002925
2005		0		418	B,916		0 000000
2004							0 000000
2 Total of line 1, column (d)						2	0 083621
3 Average distribution ratio fo					у Г		
the number of years the fou	indation has been in existend	ce if le	ss than 5	years	}	3	0 020905
4 Enter the net value of noncl	naritable-use assets for 2009	from	Part X, lır	ne 5	-	4	1,662,721
5 Multiply line 4 by line 3					-	5	34,759
6 Enter 1% of net investment	income (1% of Part I, line 27	7b)			-	6	409
7 Add lines 5 and 6					-	7	35,168
8 Enter qualifying distributions If line 8 is equal to or greate	s from Part XII, line 4 er than line 7, check the box	ın Part	: VI, line 1	b, and complete	that pa	8 art using a 1	96,191 % tax rate See
the Part VI instructions on p	page 18						

1 a Exempt operating foundations described in section 4940(p2), check here ▶ ☐ and enter *NA* on line 1 Date of failing of determination letter (states here yet letter if necessary—see instructions) b Dohestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ∑all and eiter 1% of Part 1, line 27b c All other domestic foundations enter 2% of time 27b Exempt foreign organizations enter 4% of Part 1, line 17c c All other domestic foundations enter 2% of time 27b Exempt foreign organizations enter 4% of Part 1, line 17c of Part 2, lin	Pa	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see pa	age 1	8 of the	inst	ructio	ons)
Date of ruling or determination letter Latent copy of tester if necessary—see instructions)	1 :	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1					
b Dofneste foundations that meet the section 494(g)e requirements in Part V. check here							
here ► Main and enter 1% of Part I, line 27b c All other domestic foundations enter 2% of line 27b c All other domestic foundations enter 2% of line 27b a doll mes 1 and 2 3 doll mes 1 and 2 4 Subhitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 6 Credit/Psyments a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign origanizations—Lax withheld at source c 1 as pad with application for extension of time to file (Form 8868) d Backup withholding erroreously withheld 6 Enter any penalty for underpayment of estimated tax. Check here	ı		1			409	<u> </u>
of Part I, line 12, cot (b) Tax Inders ection 511 (domestic section 4947(a)(1) frusts and taxable foundations only Others enter -0-) 3 Add lines 1 and 2 Subtille A (income) tax (domestic section 4947(a)(1) frusts and taxable foundations only Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 6 Credition Payments a 2009 estimated tax payments and 2008 overpayment credited to 2009 6 Exempt foreign organizations—tax withheld at source 7 Tax based on investment and 2008 overpayment credited to 2009 6 Exempt foreign organizations—tax withheld at source 7 Total credits and payments credited to 1009 8 Exempt foreign organizations—tax withheld at source 9 Total credits and payments and doll lines 5 and 8, enter the amount owed 10 Overpayment, if line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment, if line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment, if line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be Credited to 2010 estimated tax 12 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? 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 13 Line answer is "Yes" to 1 a or 1b, attach a detailed description of the activities and copies of any materials published of distributed by the foundation in connection with the activities 14 Exemption of distributed by the foundation or monection with the activities 15 Line answer is "Yes" to 1 a or 1b, attach a detailed description of the activities 16 Line answer is "Yes" to 1 a or 1b, attach a detailed description of the activities 17 Line answer is "Yes"							
2 Tax based section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-) 3 409 4 Subbite A (proome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-) 6 409 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter-0-) 6 400 6 Credits/Payments and 2008 overpayment credited to 2009 6 Exempt foreign organizations—tax withheld at source c Tax paid with application for extension of time to file (Form 8968) 6 6 Ed 0		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4%					
3 409 3 409 4 Subbille A (normone) lax (domestic section 4947(a)(1) frusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 6 Creditis/Payments a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations—tax withheld at source 7 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 6 Creditis/Payments a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations—tax withheld at source 7 Tax due. India application for extension of time to file (Form 8888) 6 Ca		of Part I, line 12, col (b)					
Subtlite A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter -0- Credits*Payments a 2009 estimated tax payments and 2008 overpayment credited to 2009 Exempt foreign organizations—Lax withhelid at source C Tax paid with application for extension of time to file (Form 8868) Each of Backup withholding erroreously withhelid Total credits and payments. Add lines 6a through 6d Total credits and payments. Add lines 6a through 6d Cell and payments. Add lines 6a through 6d Total credits and payments. Add lines 6a through 6d Cell and payments. Add lines 5 and 8is more than file 7, enter amount over all 1.50 Tax due. If the total of lines 5 and 8is more than line 7, enter amount over paid Cell and the amount of line 10 to be Credited to 2019 estimated tax. Tax due, If the total of lines 5 and 8is more than line 17, enter amount overpaid Total credits and payments. Add lines 5 and 8is more than the total of lines 5 and 8, enter the amount overpaid. The file is an average of the amount of line 10 to be Credited to 2019 estimated tax. Total a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation with the activities and copies of any materials published or distributed by the foundation for the activities. C Did the foundation in Form 1120-POL for this year? The file answer is "Yes" to a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation during the year for political expenditure tax imposed on foundation managers. The state the statement required by General Instruction 17" Yes, "attach a c	2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2			0	
5 Tax based on investment income. Subtract line 4 from line 3 lf zero or less, enter -0- Credits/Payments a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations—Lax withheld at source C Tax pad with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld T Total credits and payments Add lines 8 th through 6d B Enter any penalty for underpayment of estimated tax Check here If Form 2200 is attached T Total credits and payments. Add lines 8 th through 6d C Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald O Overpayment. If line 7 is more than the output of the overpayment of the structure of the overpayment of th	3	Add lines 1 and 2	3_			409	
6 Credits/Payments a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations—Lax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld f Total credits and payments. Add lines 6a through 6d Befler any penalty for underpayment of estimated tax. Check here defended for the folial credits and payments. Add lines 6a through 6d Befler any penalty for underpayment of estimated tax. Check here defended for the folial credits and payments. Add lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the standard than 5 and 1 lines 1 lin	4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4				
a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations—lax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld Total credits and payments. Add lines 6s at through 6d Enter any penalty for underpayment of estimated tax Check here ☐ If Form 2220 is attached Total credits and payments. Add lines 6s at 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 Tax due, If the total of lines 5 and 8 is more than line 7, enter amount owed To overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid Tent VII-A Statements Regardling Activities 1 a 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 campagin? 2 b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 3 b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 4 c Did the foundation of the properties of the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities or foundation flore or the year? 4 c Enter the amount (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers S C D dit the foundation have any changes, not previously people to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If Yes, * attach a conformed copy of	5		5	ļ		409	
b Exempt foreign organizations—lax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here	6	·					
c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached Total credits and payments. Add lines 6a through 6d Total credits and payments. For more than the total of lines 5 and 8, enter the amount owed Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to be Credited to 2010 estimated tax Total Cherch the amount of line 10 to the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials Total Cherch the amount (if any) tax on political expenditures (section 4955) imposed during the year (i) On the foundation Payment 1120-PDL for this year? If Yes, Tatach the attached description of the activities of incorporation, or bylaws, or other similar instruments? If Yes, attach a conformed copy of the changes A Did the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If Yes, attach a conformed copy of the changes A Did the foundation have unrelated business gross income of \$1,000 or more during the year? B							
d Backup withholding erroneously withheld 7 Total credits and payments Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here							
Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here		` '' \ '' \ \ \ \ \ \ \ \ \ \ \ \ \ \ \		1			
8 Enter any penalty for underpayment of estimated tax. Check here	_						
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4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year? b If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T 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? Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ DE b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Altorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation 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 on page 27)? If "Yes," complete Part XIV Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	J				3		- Y
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instructions) ▶ DE 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 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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? 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 10 X	7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), a	nd Pa	art XV	7	Х	
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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 10 X	9						
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X)?		_		,,
their names and addresses 10 X	40	·			9		
	10	• • • • • • • • • • • • • • • • • • • •					,
		their names and addresses			-	<u> </u>	<u> </u>

• Form	990-PF (2009) The Peternell Family Foundation 20-386	4384	Р	age 5
Par	t 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 page 20 of the instructions)	11		Х
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
	August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Χ	
44	Website address			4754
14	The books are in care of ► Foundation Source Telephone no ► Located at ► 501 Silverside Road, Suite 123, Wilmington, DE ZIP+4 ► 19809-1377) 839-	1/54
15	Located at ► 501 Silverside Road Suite 123, Wilmington, DE ZIP+4 ► 19809-1377 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 .		•	• ⊔
Pa	rt 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.	1	Yes	No
1a	During the year did the foundation (either directly or indirectly)		103	
	(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)			
	a disqualified person?			İ
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No			Ì
	(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			
	for the benefit or use of a disqualified person)?			ļ
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			İ
	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)			
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)?	1b	N/A	
_	Organizations relying on a current notice regarding disaster assistance check here			
С	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?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private			^
_	operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
а				
	and 6e, Part XIII) for tax year(s) beginning before 2009?			
	If "Yes," list the years > 20, 20, 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2)			
	to all years listed, answer "No" and attach statement—see page 20 of the instructions)	2b	N/A	
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20			!
3a	Did the foundation hold more than a 2% direct or indirect interest in any business			ļ
	enterprise at any time during the year?			
b				
	or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved			1
	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 2009)	3b	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable	- <u>-</u> -		
	purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		Х

¥о́гг	1990-PF (2009) The Peternell Family Founda	ition						20-386	4384	Р	age 6
Pa	rt VII-B Statements Regarding Activit	ies f	or Which Forn	n 47	720 May Be R	equired	(continued)	_			
	During the year did the foundation pay or incur ar				-						
	(1) Carry on propaganda, or otherwise attempt	to infl	uence legislation (sect	tion 4945(e))?		Yes	X No			
	(2) Influence the outcome of any specific public			955)	, or to carry		_				
	on, directly or indirectly, any voter registration	n driv	/e [?]				Yes	X No			
	(3) Provide a grant to an individual for travel, st	udy, c	or other similar pur	pose	es?		Yes	X No			
	(4) Provide a grant to an organization other tha	n a ch	aritable, etc., orga	anıza	ation described			_			
	in section 509(a)(1), (2), or (3), or section 4	940(d)	(2)? (see page 22	of t	he instructions)		Yes	X No			
	(5) Provide for any purpose other than religious	, chai	ritable, scientific, li	tera	ry, or						
	educational purposes, or for the prevention	of cru	elty to children or	anın	nals?		Yes	X No			
b	If any answer is "Yes" to 5a(1)-(5), did any of the	trans	actions fail to qual	ıfy u	nder the exception	ns describ	ed in				
	Regulations section 53 4945 or in a current notice	rega	rding disaster assi	stan	ice (see page 22	of the instr	uctions)?		5b	N/A	
Organizations relying on a current notice regarding disaster assistance check here							ł				
С	If the answer is "Yes" to question $5a(4)$, does the	found	atıon claim exemp	tion	from the			_			
	tax because it maintained expenditure responsible	-	-				Yes	X No			}
	If "Yes," attach the statement required by Regular	ions s	ection 53 4945–5	(d)						ł	i
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay										
	premiums on a personal benefit contract?						Yes	X No			
b	Did the foundation, during the year, pay premium	s, dire	ctly or indirectly, o	n a	personal benefit o	contract?		•	6b	\longrightarrow	X
_	If "Yes" to 6b, file Form 8870						П.,			ļ	
	At any time during the tax year, was the foundation		•				Yes	X No	 		
_	If yes, did the foundation receive any proceeds or							D	7b	N/A	
Р	Information About Officers	, Dir	ectors, i ruste	es,	, Foundation	Manage	rs, Hignly I	Paid Em	pioy	es,	
4	and Contractors List all officers, directors, trustees, found	lation	. managare and	1 th	oir component	ion (soo r	22 of th	ho inotru	otion		
<u> </u>	List an officers, directors, trustees, found		Title, and average		c) Compensation		ontributions to				
	(a) Name and address	` '	hours per week		f not paid, enter	employ	ee benefit plans			se accou	
SF	ATTACHMENT	1	evoted to position	H	-0-)	and dejei	red compensate	on			
		1		İ							
						-		1			
		ļ									
			İ	l							
		<u> </u>									
2	Compensation of five highest-paid emplo	yees	(other than the	ose	included on li	ne 1—see	page 23 of	the inst	ructio	ns).	
	If none, enter "NONE."		T		r	1 44					
			(b) Title, and avera			م ا) Contributions to mployee benefit		Expens	se accor	unt.
(a	Name and address of each employee paid more than \$5	0,000	hours per week devoted to position		(c) Compensation	pla pla	ans and deferred			owance	
NO	NE					_	compensation				
ΝŌ	NE.										
			-					- 			
			<u> </u>								
Tof	al number of other employees paid over \$50	000							•	- [

Form **990-PF** (2009)

Form 990-PF (2009) The Peternell Family Foundation		20-3864384 Page 7
Part VIII Information About Officers, Director	s, Trustees, Foundation Managers, Highly Pa	aid Employees,
and Contractors (continued)		
3 Five highest-paid independent contractors for profession		
(a) Name and address of each person paid more than \$50,000	0 (b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for profession	inal services	•
Part IX-A Summary of Direct Charitable Activi	ties	
List the foundation's four largest direct charitable activities during the tax ye the number of organizations and other beneficiaries served, conferences co		Expenses
1 NONE		
••••		
2		
3		
4		
Part IX-B Summary of Program-Related Investme	nts (see page 24 of the instructions)	
Describe the two largest program-related investments made by the foundation	on dunng the tax year on lines 1 and 2	Amount
1 NONE		
2		
All other program-related investments See page 24 of the instructions		
3		
Total Add lines 1 through 3		1

Pai	Minimum Investment Return (All domestic foundations must complete this part. Foreign for see page 24 of the instructions.)	oundat	ions,
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	1,599,332
b	Average of monthly cash balances	1b	88,710
С	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,688,042
e	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,688,042
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25		
	of the instructions)	4	25,321
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,662,721
6	Minimum investment return. Enter 5% of line 5	6	83,136
	Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private op foundations and certain foreign organizations check here □ and do not complete this part)	erating	
1	Minimum investment return from Part X, line 6	1	83,136
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009 (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	409
3	Distributable amount before adjustments Subtract line 2c from line 1	3	82,727
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	82,727
6	Deduction from distributable amount (see page 25 of the instructions)	6	02,121
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
-	line 1	7	82,727
		<u> </u>	02,727
Par	Qualifying Distributions (see page 25 of the instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	96,191
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
а	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	96,191
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	409
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	95,782
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the found	ation	
	qualifies for the section 4940(e) reduction of tax in those years		

	90-PF (2009) The Peternell Family Foundation XIII Undistributed Income (see page 26 of t	he instructions)		20-38	364384 Page 9
Pail	Ondistributed income (see page 20 or t	(a)	(b)	(c)	(d)
1	Distributable amount for 2009 from Part XI,	Corpus	Years prior to 2008	2008	2009
_	line 7				82,727
2	Undistributed income, if any, as of the end of 2009				
	Enter amount for 2008 only			96,107	
	Total for prior years 20, 20, 20		0		
3	Excess distributions carryover, if any, to 2009 From 2004				
-	From 2005				
	From 2006				
ď	From 2007				
е	From 2008				
f	Total of lines 3a through e	0			
4	Qualifying distributions for 2009 from Part				
	XII, line 4 • \$96,191				
а	Applied to 2008, but not more than line 2a			96,107	
b	Applied to undistributed income of prior years				
	(Election required—see page 26 of the instructions)		0		
С	Treated as distributions out of corpus (Election				
	required—see page 26 of the instructions)				
	Applied to 2009 distributable amount	_			84
_	Remaining amount distributed out of corpus	0			
5	Excess distributions carryover applied to 2009	0			0
	(If an amount appears in column (d), the same amount must be shown in column (a))				
6	Enter the net total of each column as				
	indicated below:				
	Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b	Prior years' undistributed income Subtract				
	line 4b from line 2b		0		
С	Enter the amount of prior years' undistributed				
	income for which a notice of deficiency has				
	been issued, or on which the section 4942(a)				
ч	tax has been previously assessed Subtract line 6c from line 6b Taxable				
u	amount—see page 27 of the instructions		0		
e	Undistributed income for 2008 Subtract line				
·	4a from line 2a Taxable amount—see page 27 of the				
	Instructions			o	
f	Undistributed income for 2009 Subtract				
	lines 4d and 5 from line 1. This amount must				
	be distributed in 2010				82,643
7	Amounts treated as distributions out of				
	corpus to satisfy requirements imposed by				
	section 170(b)(1)(F) or 4942(g)(3) (see page 27 of				
_	the instructions)		·		v -1-0
8	Excess distributions carryover from 2004				
	not applied on line 5 or line 7 (see page 27 of the	_			
Δ.	instructions)	0			
9	Excess distributions carryover to 2010.	_			
10	Subtract lines 7 and 8 from line 6a . Analysis of line 9	0		 	
	Excess from 2005				
	Excess from 2006 0				
	Excess from 2007 0				
d	Excess from 2008 0				
	Excess from 2009				

	` ,					
_	1990-PF (2009) The Peternell Family Found			- 1 D - 4 \ / A	20-3864	1384 Page 10
	t XIV Private Operating Foundations (s			id Part VII-A, qu	estion 9)	N/A
ıa	If the foundation has received a ruling or determin foundation, and the ruling is effective for 2009, entitle the second			•		
b	Check box to indicate whether the foundation is a	private operating four	ndation described in	section	4942(j)(3) or	4942(j)(5)
2 a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		
	income from Part I or the minimum investment return from Part X for each	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
	year listed .	0				0
	85% of line 2a	0	0	0	0	0
С	Qualifying distributions from Part XII, line 4 for each year listed	0				0
d	Amounts included in line 2c not used directly for active conduct of exempt activities .					0
е	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	0	0	0	0	0
3 a	Complete 3a, b, or c for the alternative test relied upon "Assets" alternative test—enter		_			
_	(1) Value of all assets					0
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
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	0				0
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					0
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)			·		0
	(3) Largest amount of support from an exempt organization					0
	(4) Gross investment income					0
Pa	rt XV Supplementary Information (Co	•	-		000 or more in	
	assets at any time during the ye		of the instruct	tions.)		
1	Information Regarding Foundation Manag List any managers of the foundation who have cor		2/ of the total central	hutians racewood by	the foundation	
а	before the close of any tax year (but only if they have				ine louridation	
Ber	n Peternell Pamela Pe					
b	List any managers of the foundation who own 109				ortion of the	
NO	ownership of a partnership or other entity) of whick	n the foundation has a	a 10% or greater int	erest		
2	Information Regarding Contribution, Gran	nt. Gift. Loan. Scho	olarship, etc., Pr	ograms:		
	Check here ► X if the foundation only makes unsolicited requests for funds. If the foundation may under other conditions, complete items 2a, b, c, at	s contributions to pres akes gifts, grants, etc	elected charitable o	organizations and do		ions
а	The name, address, and telephone number of the	person to whom appl	cations should be	addressed		
b	The form in which applications should be submitted	ed and information and	d materials they sho	ould include		
С	Any submission deadlines				·	
d	Any restrictions or limitations on awards, such as factors	by geographical areas	s, charitable fields, l	kınds of institutions,	or other	

20-3864384

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year

<u> </u>	rants and Contributions Paid During the			ment	
	Recipient	If recipient is an individual, show any relationship to any foundation manager	status of	Purpose of grant or contribution	Amount
	Name and address (home or business)	or substantial contributor	recipient	oond batton	
a SEE	Paid during the year ATTACHMENT	or substantial contribution			22.000
	Total		т	<u>▶ 3a</u>	83,000
b NOM					
	Total			▶ 3b	

Form 990-PF (2009) The Peternell Family Founda Part XVI-A Analysis of Income-Producin			- <u>-</u>	20-386	4384 Page 12
	Unrelated bus	iness income	Excluded by sector	n 512, 513, or 514	(0)
Enter gross amounts unless otherwise indicated .	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See page 28 of
Program service revenue a					the instructions)
b					
d		-			
f					
g Fees and contracts from government agencies2 Membership dues and assessments					
3 Interest on savings and temporary cash investment	ts				
4 Dividends and interest from securities			14	76,140	
5 Net rental income or (loss) from real estate a Debt-financed property			<u> </u>		
b Not debt-financed property					-
6 Net rental income or (loss) from personal property					
7 Other investment income8 Gain or (loss) from sales of assets other than inver	nton,		18	53	
9 Net income or (loss) from special events	nory		10		· · · · · · · · · · · · · · · · · · ·
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b			 		
d					
e				70.400	
12 Subtotal Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e)		(JI	76,193 13	<u>0</u> 76,193
(See worksheet in line 13 instructions on page 28 to ve	erify calculations)	•			70,100
Part XVI-B Relationship of Activities to t					
Line No. Explain below how each activity for which the accomplishment of the foundation's page 28 of the instructions)					
N/A					
				· · · · · · · · · · · · · · · · · · ·	
			<u>-</u>		
					
				·	
					

Firm's name (or yours if Firm's name (or yours if self-employed), address,

and ZIP code

FOUNDATION SOURCE

55 WALLS DRIVE, FAIRFIELD, CT 06824

Foπ	n 990-PF	(2009) The Peterne	ell Family Fou	ndation				20-3864	384	Pag	je 1 3
Рa	rt XVII	Information Reg	arding Tran		ansactions a	and Re	lationships W				
	` 	Exempt Organiz			4.0.						· · · ·
1		e organization directly	-		-	•	-		ļ	Yes	No
		tion 501(c) of the Code	e (other than s	section 501(c)(3) o	rganizations) c	or in sec	tion 527, relating	to political		}	ĺ
	organi	zations?							'		ĺ
а	Transf	fers from the reporting	foundation to	a noncharitable e	xempt organiza	ation of:			\		l
	(1) Ca	ash							1a(1)		X
	(2) 01	ther assets							1a(2)		Х
þ	Other	transactions:									
	(1) Sa	ales of assets to a non	charitable exe	empt organization					1b(1)		Х
	(2) Pt	urchases of assets from	m a noncharita	able exempt organ	ization				1b(2)		Х
	(3) Re	ental of facilities, equip	ment, or othe	erassets					1b(3)		Х
	(4) Re	eimbursement arrange	ments						1b(4)		X
		oans or loan guarantee							1b(5)		Х
		erformance of services							1b(6)		Х
C	Sharin	ig of facilities, equipme	ent, mailing lis	its, other assets, o	r paid employe	es			1c		X
d	If the a	answer to any of the al	bove is "Yes,"	complete the folio	wing schedule	. Colum	n (b) should alv	ays show the fa	air mar	ket	
	value value	of the goods, other as: in any transaction or s	sets, or servic haring arrang	es given by the re ement, show in co	porting foundat lumn (d) the v	tion. If th alue of t	ne foundation rec he goods, other	ceived less than assets, or servi	fair ma ces rec	arket œived	1 .
(a)	Line no.	(b) Amount involved	(c) Name	of noncharitable exemp	t organization	(d) De	scription of transfers,	transactions, and si	nanng ar	rangen	nents
	1		NONE								
			<u> </u>								
	 	<u> </u>					·				
				· · · · · · · · · · · · · · · · · · ·		ļ					
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	·		<u> </u>								
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						<u> </u>	****				
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			ļ			<u> </u>		····			
			<u> </u>		··· · · · · · · · · · · · · · · · ·	<u> </u>		 			
2a	Is the	foundation directly or i	ndirectly affilia	ated with, or relate	d to, one or mo	ore tax-e	exempt organiza	tions			
		bed in section 501(c) of		ther than section 5	501(c)(3)) or in	section	527?	· · · · 📙 🕽	∕es <u>[X</u>	No	
_ <u>D</u>	IT "Yes	s," complete the following	ing schedule.	γ		· · · · · · · · · · · · · · · · · · ·		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			·
		(a) Name of organization		(b) Type	of organization	 	(c) De	cription of relationsh	<u>rip</u>		
N/A	<u> </u>		·	<u> </u>							
						 	ļ				
											
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—	1		· · · · · · · · · · · · · · · · · · ·	<u> </u>			<u> </u>				
		er penalties of perjury, I decla									
	06116	t it is true, correct and comp	piete. Declaration	or preparer (other than	taxpayer or noucial	ry) is base	d on all information of	Livnich preparer nas	any kno	wieago	∌.
		A. Poli			1.3	3/28	d	Heside	15		
9		nature of officer or trustee	mer	. 		ate		ار سود	4		
Sign Here	- Sig	material of other of firstee	·	· · · · · · · · · · · · · · · · · · ·	1	ara	7 10	<u></u>			
_	_			_	Date			Preparer's id			
<u>5</u>	_%≥	Branconda & CT	TIN	L-ACT			Check if	number (see	-		
S	Paid Preparer's Use Only	Preparer's signature	5 7 7 result	The second	03/22/2	010	self-employed ▶	page 30 of t	in histru	cuons)	
	L E S	Firm's name (or yours if	FOURIE	TION COURCE	L			I =			
	1	1		TION SOURCE				EIN >			

Phone no. (800) 839-1754

EIN >

The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part I, Line 16c - Other Professional Fees

(d) Charitable Purpose	0 \$	0\$
(c) Adjusted Net Income	ı	,
(b) r Net Investment Income	\$9,628	\$9,628
(a) Expenses per Ne Books	\$9,628	\$9,628
	INVESTMENT MANAGEMENT SERVICES	TOTAL:

The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part I, Line 18 - Taxes

	(a) Expenses per Ne Books	(b) st Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
ESTIMATED TAX FOR 2009	\$800	\$0	1	0\$
EXCISE TAX REFUND	(\$823)	0\$	•	0\$
	TOTAL: (\$23)	0\$	•	0\$

The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part I, Line 23 - Other expenses

(d) Charitable Purpose	\$13,191	\$13,191
(c) Adjusted Net Income		•
(b) er Net Investment Income	\$0	\$
(a) Expenses per Ne Books	\$13,191	\$13,191
		TOTAL:
	ADMINISTRATIVE FEES	

The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part II, Line 10a - Columns (b) & (c) - U.S. and State Government Obligations

Shares	Description/Symbol/CUSIP Number	Line 10a - Column (b) Book Value	Line 10a - Column (c) Fair Market Value
35000	Canyon Tex Regl Water Auth Ref - Taxable - Lake Dunlap 5 625% 08/01/11 (139042LE3)	\$34,996.15	\$35,818.30
35000	Cook County III Sch Dist No 099 Taxable - Ser A 6 125% 12/01/16 (214381GY5)	\$35,952.45	\$38,319.05
40000	Eastern lowa Community College Dis Taxable Indl Merged 5.625% 06/01/13 (276540WA5)	\$39,976.40	\$43,129.20
25000	FFCB Note 6.% 03/07/11 (31331LCX4)	\$25,436.50	\$26,539 00
35000	Fed Home Loan Note 6.625% 11/15/10 (3133MCLA1)	\$36,601 00	\$36,815.80
40000	FEDERAL HOME LN BKS CONS BD 5 37500% 05/15/2019 (3133X72S2)	\$42,245.23	\$42,812 40
40000	FEDERAL HOME LN BKS CONS BD 5.00000% 11/17/2017 (3133XMQ87)	\$40,513.80	\$43,146.40
35000	FEDERAL HOME LOAN BANKS 4.75000% 06/08/2018CONS BD (3133XRFZ8)	\$35,274.05	\$36,760.85
40000	LA Calf Mun (544587MZ8)	\$40,002.80	\$39,603 60
40000	Maine St Taxable 5 6% 06/15/12 (56052ASL1)	\$40,193.20	\$43,434 40
35000	Mount Horeb Wis Area Sch Dist Ref - Taxable 5.7% 03/01/14 (621638HJ7)	\$35,006 46	\$36,903 65
40000	OHIO ST GO BDS 05.450% 05/1/18 (677520F78)	\$39,969 20	\$41,417 60
35000	PHOENIX AZ CIVIC IMPT CORP EXCISE TAX06.250% 07/12 (71884ANX3)	\$36,284 95	\$37,688.00
25000	TEXAS ST TAXABLE-MILITARY 05.250% 10/01/2017 (882721TW3)	\$24,905.25	\$25,755 00
40000	Virginia St Res Auth Infrastructure Taxable - SR - Ser A 5.59% 11/01/13 (92817PT61)	\$40,006.86	\$43,544.80
	TOTAL:	\$547,364	\$571,688

The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part II, Line 10b - Columns (b) & (c) - Investments: Corporate Stock

Shares	Description/Symbol	Line 10b - Column (b) Book Value	Line 10b - Column (c) Fair Market Value
8817	ABSOLUTE STRATEGIES INSTITUTIONAL (ASFIX)	\$88,550 00	\$92,142.65
8674	PRINCIPAL INV FD, HIGH YIELD FD CL A (CPHYX)	\$71,036.41	\$67,393.52
3122	DFA INTERNATIONAL SMALL CAP VALUE PORTFOLIO (DISVX)	\$55,692 88	\$47,113.82
1123	ISHARES MSCI PACIFIC EX-JAPAN (EPP)	\$48,262 57	\$46,458.51
2555	ISHARES RUSSELL 1000 INDEX FD (IWB)	\$141,224.76	\$156,647.05
905	ISHARES TRUST RUSSELL 1000 VALUE INDEX FUND (IWD)	\$51,311.19	\$51,947.00
2053	ISHARES RUSSELL 2000 (IWM)	\$88,598.39	\$128,189.32
2955	MATTHEWS ASIAN GROWTH & INC FUND (MACSX)	\$38,208 91	\$46,605.95
9816	PIMCO Commodity Real Return Strategy Fund (PCRIX)	\$77,550.00	\$81,278 28
1562	PERRITT MICRO CAP OPPORTUNITIES FUND (PRCGX)	\$35,100.00	\$33,855 68
637	PARADIGM VALUE FUND (PVFAX)	\$19,100.00	\$27,235 64
12184	PAYDEN EMERGING MARKETS BOND FUND (PYEMX)	\$155,900.00	\$162,662.41
2920	VANGUARD EUROPEAN STOCK IDX FD SIGNAL SHS (VESSX)	\$64,450 00	\$68,773.16
3305	VANGUARD PACIFIC STOCK INDEX FD SIGNAL SHS (VPASX)	\$58,295.13	\$72,684.54
1451	VANGUARD EMERGING MARKETS STOCK INDEX VIPERS (VWO)	\$35,821.83	\$59,491 00
	TOTAL	\$1,029,102	\$1,142,479

The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part VIII, Line 1 - List all foundation officers, directors, trustees, foundation managers and their compensation

(a) - Name and address		(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
Ben C. Peternell c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	₹	President / Director / Secretary hour(s) per week	00 0\$	\$0.00	\$0.00
Andrew Peternell c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	<u>^</u>	Vice President hour(s) per week	\$0 O0	00 0\$	\$0.00
Mark A. Peternell c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	7	Vice President hour(s) per week	00 0\$	\$0.00	\$0.00
Pamela Peternell c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	2	Vice President / Director hour(s) per week	\$0.00	00 0\$	\$0.00
Sara Lynn Peternell c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	7	Vice President hour(s) per week	00 O\$	00 0\$	\$0.00

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The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CENTER FOR NATIVE ECOSYSTEMS INCORPORATED 1536 WYNKOOP ST STE 303, DENVER, CO 80202-1183	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$5,000 00
CHILDRENS HOSPITAL FOUNDATION 13123 E 16TH AVE, AURORA, CO 80045-7106	N/A	509(a)(1)	SHAKEN BABY SYNDROME PROGRAM	\$25,000 00
EAGLE VALLEY LAND TRUST PO BOX 3308, EAGLE, CO 81631-3308	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$5,000 00
EAST BAY COMMUNITY LAW CENTER 2921 ADELINE ST, BERKELEY, CA 94703-2502	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$5,000 00
GORE RANGE NATURAL SCIENCE SCHOOL 82 EAST BEAVER CREEK BLVD, SUITE 202, AVON, CO 81620	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$1,000 00
HABITAT FOR HUMANITY OF METRO DENVER INC 1500 W 12TH AVE, DENVER, CO 80204-3410	N/A	509(a)(1)	HOME SPONSORSHIP	\$20,000 00
ROUNDUP RIVER RANCH PO BOX 8589, AVON, CO 81620-8520	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$1,000 00
TENNYSON CENTER FOR CHILDREN AT COLORADO CHRISTIAN HOME 2950 TENNYSON ST, DENVER, CO 80212-3029	Ā/Ā	509(a)(1)	GENERAL & UNRESTRICTED	\$1,000 00

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The Peternell Family Foundation EIN: 20-3864384 Taxable Year Ending December 31, 2009

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE NATURE CONSERVANCY - COLORADO CHAPTER 2424 SPRUCE STREET, BOULDER, CO 80302	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$1,000 00
TROUT UNLIMITED 1300 17TH ST N STE 500, ARLINGTON, VA 22209-3800	N/A	509(a)(1)	COLDWATER CONSERVATION FUND	\$10,000 00
UNIVERSITY OF COLORADO FOUNDATION 4740 WALNUT ST, BOULDER, CO 80301-2538	N/A	509(a)(1)	ATHLETIC SCHOLARSHIP PROGRAM	\$9,000 00

\$83,000

TOTAL: