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## Return of Private Foundation

OMB No 1545-0052

2009

Department of the Treasury  
Internal Revenue Serviceor 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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type  
See Specific  
Instructions

Name of foundation

THE PETERSON FAMILY FOUNDATION, INC.

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

12500 FAIR LAKES CIRCLE SUITE 400

Room/suite

City or town, state, and ZIP code

FAIRFAX, VA 22033

A Employer identification number

54-1870812

B Telephone number

(703) 227-2000

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test,  
check here and attach computation ☐E If private foundation status was terminated  
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year  
(from Part II, col (c), line 16)

\$ 2,305,163. (Part I, column (d) must be on cash basis)

J Accounting method

☒ Cash☐ Accrual☐ Other (specify)

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not  
necessarily equal the amounts in column (a))(a) Revenue and  
expenses per books(b) Net investment  
income(c) Adjusted net  
income(d) Disbursements  
for charitable purposes  
(cash basis only)

Revenue

1 Contributions, gifts, grants, etc., received

1,132,503.

2 Check ☐ if the foundation is not required to attach Sch. B3 Interest on savings and temporary  
cash investments

14.

14.

14.

STATEMENT 1

4 Dividends and interest from securities

1,626.

1,626.

1,626.

STATEMENT 2

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

-15,107.

b Gross sales price for all  
assets on line 6a

1,102,098.

7 Capital gain net income (from Part IV, line 2)

0.

8 Net short-term capital gain

0.

9 Income modification

10a Gross sales less returns  
and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

12 Total. Add lines 1 through 11

1,119,036.

1,640.

1,640.

Operating and Administrative Expenses

13 Compensation of officers, directors, trustees, etc

0.

0.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

b Accounting fees

STMT 3

5,850.

0.

0.

c Other professional fees

17 Interest

18 Taxes

STMT 4

13.

0.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 5

566,401.

0.

0.

24 Total operating and administrative  
expenses Add lines 13 through 23

572,264.

0.

0.

25 Contributions, gifts, grants paid

678,471.

26 Total expenses and disbursements  
Add lines 24 and 25

1,250,735.

0.

0.

27 Subtract line 26 from line 12

-131,699.

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

1,640.

c Adjusted net income (if negative, enter -0-)

1,640.

917

**Part II Balance Sheets**

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing		1.	1.
	2 Savings and temporary cash investments	658,936.	941,127.	941,127.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
<b>Liabilities</b>	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 6	1,577,926.	1,364,035.	1,364,035.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	2,236,862.	2,305,163.	2,305,163.
	17 Accounts payable and accrued expenses		200,000.	
	18 Grants payable			
<b>Net Assets or Fund Balances</b>	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 7)	50,285.	50,285.	
23 Total liabilities (add lines 17 through 22)	50,285.	250,285.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,186,577.	2,054,878.	
30 Total net assets or fund balances	2,186,577.	2,054,878.		
31 Total liabilities and net assets/fund balances	2,236,862.	2,305,163.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,186,577.
2 Enter amount from Part I, line 27a	2	-131,699.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,054,878.
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	2,054,878.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b> 17,164 SHARES CAPELLA	D	08/25/09	08/31/09
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b> 1,102,098.		1,117,205.	-15,107.
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			-15,107.
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

<b>2</b> Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	<b>2</b>	-15,107.
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		<b>3</b>	-15,107.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	2,683,549.	797,786.	3.363745
2007	1,402,181.	3,278,613.	.427675
2006	2,086,475.	2,907,308.	.717666
2005	2,315,289.	4,242,939.	.545680
2004	1,427,180.	1,342,887.	1.062770

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	6.117536
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	1.223507
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	<b>4</b>	27,044.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	33,089.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	16.
<b>7</b> Add lines 5 and 6	<b>7</b>	33,105.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	678,471.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	16.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		3	16.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	16.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 20,815.	7	20,815.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	20,799.
7 Total credits and payments Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
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	20,799. Refunded		

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>VA</u>		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► BLANCA R. RAMOS Located at ► 12500 FAIR LAKES CIRCLE, STE 400, FAIRFAX, VA Telephone no ► (703) 631-7541 ZIP+4 ► 22033			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► 15 N/A		

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
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?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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, Form 4720, to determine if the foundation had excess business holdings in 2009)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 8		0.	0.	0.

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

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

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

0





**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	25,700.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	1,756.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	27,456.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	27,456.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	412.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	27,044.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	1,352.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	678,471.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	678,471.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	16.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	678,455.

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

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				0.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ N/A				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				0.
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).)	0.			0.
6 Enter the net total of each column as indicated below.	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
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 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

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

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

06/19/98

b Check box to indicate whether the foundation is a private operating foundation described in section

☒ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2009	(b) 2008	(c) 2007	(d) 2006	

1,352.	18,526.	84,183.	131,967.	236,028.
--------	---------	---------	----------	----------

b 85% of line 2a

1,149.	15,747.	71,556.	112,172.	200,624.
--------	---------	---------	----------	----------

c Qualifying distributions from Part XII, line 4 for each year listed

678,471.	2,683,734.	1,402,181.	2,086,475.	6,850,861.
----------	------------	------------	------------	------------

d Amounts included in line 2c not used directly for active conduct of exempt activities

0.	0.	0.	0.	0.
----	----	----	----	----

e Qualifying distributions made directly for active conduct of exempt activities

678,471.	2,683,734.	1,402,181.	2,086,475.	6,850,861.
----------	------------	------------	------------	------------

3 Complete 3a, b, or c for the alternative test relied upon

a "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

901.	26,593.	109,287.	87,978.	224,759.
------	---------	----------	---------	----------

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)

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.

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**1 Information Regarding Foundation Managers:**

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

**SEE STATEMENT 11**

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

**SEE STATEMENT 12****2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

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

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

**SEE STATEMENT 13**

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

c Any submission deadlines

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



## Part XVI-A

(See worksheet in line 13 instructions to verify calculations )

**Part XVI-B**Form **990-PF** (2009)

## Part XVII

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

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

[illegible]

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

- b If "Yes," complete the following schedule**

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

**Sign Here**

Lauren P. Fellows  
Signature of officer or trustee

Date \_\_\_\_\_

PRESIDENT

Title

**Paid  
Preparer's  
Use Only**

Preparer's  
signature

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

Claudia M. Sensi, CPA  
CLAUDIA M. SENSI, C.P.A.

12500 FAIR LAKES CIRCLE, #400  
FAIRFAX, VA 22033

Date 11

११९१८

☐ Check if self-employed

Preparer's identifying number

EIN ▶

Phone no 7036317545

Form **990-PF** (2009)

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

**2009**

Name of the organization

THE PETERSON FAMILY FOUNDATION, INC.

Employer identification number

54-1870812

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)( ) (enter number) organization

☐4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions**General Rule**

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

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

THE PETERSON FAMILY FOUNDATION, INC.

54-1870812

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	FAIR LAKES 10K, INC. 12500 FAIR LAKES CIRCLE, STE 400 FAIRFAX, VA 22033	\$ 15,298.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	PETERSON INVESTMENT TRUST 12500 FAIR LAKES CIRCLE, STE 400 FAIRFAX, VA 22033	\$ 1,117,205.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)



Employer identification number

54-1870812

[illegible]

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FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

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SOURCE	AMOUNT
GOLDMAN SACS	4.
UNITED BANK	10.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	14.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
GOLDMAN SACS	1,626.	0.	1,626.
TOTAL TO FM 990-PF, PART I, LN 4	1,626.	0.	1,626.

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FORM 990-PF ACCOUNTING FEES STATEMENT 3

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING & MGMT FEES	5,850.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	5,850.	0.	0.	0.

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FORM 990-PF TAXES STATEMENT 4

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
REAL ESTATE TAX	13.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	13.	0.	0.	0.

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FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ANNUAL STATE CORPORATE FEE	25.	0.	0.	0.	
PROGRAM EXPENSES	566,081.	0.	0.	0.	
BANK FEES	295.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	566,401.	0.	0.	0.	

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
70% INTEREST IN WETLAND BANK CREDITS	FMV	1,364,035.	1,364,035.	
TOTAL TO FORM 990-PF, PART II, LINE 13		1,364,035.	1,364,035.	

FORM 990-PF	OTHER LIABILITIES		STATEMENT	7
DESCRIPTION	BOY AMOUNT	EOY AMOUNT		
UNREALIZED GAINS ON INVESTMENTS	50,285.	50,285.		
TOTAL TO FORM 990-PF, PART II, LINE 22	50,285.	50,285.		

FORM 990-PF      PART VIII - LIST OF OFFICERS, DIRECTORS      STATEMENT      8  
TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MILTON V. PETERSON 12500 FAIR LAKES CIRCLE, SUITE 400 FAIRFAX, VA 22033	DIRECTOR 0.00	0.	0.	0.
LAUREN P. FELLOWS 12500 FAIR LAKES CIRCLE, SUITE 400 FAIRFAX, VA 22033	PRESIDENT 5.00	0.	0.	0.
WILLIAM E. PETERSON 12500 FAIR LAKES CIRCLE, SUITE 400 FAIRFAX, VA 22033	TREASUER 0.00	0.	0.	0.
CAROLYN S. PETERSON 12500 FAIR LAKES CIRCLE, SUITE 400 FAIRFAX, VA 22033	DIRECTOR 0.00	0.	0.	0.
JON M. PETERSON 12500 FAIR LAKES CIRCLE, SUITE 400 FAIRFAX, VA 22033	VICE-PRESIDENT 0.00	0.	0.	0.
STEVEN B. PETERSON 12500 FAIR LAKES CIRCLE, SUITE 400 FAIRFAX, VA 22033	SECRETARY 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF      SUMMARY OF DIRECT CHARITABLE ACTIVITIES      STATEMENT      9

## ACTIVITY ONE

THE PETERSON FAMILY FOUNDATION IS COMMITTED TO WETLANDS RESEARCH TO MITIGATE THE CONSEQUENCES OF URBAN GROWTH. THE FOUNDATION SPONSORS A GRANT PROGRAM TO ALL EDUCATIONAL FACILITIES. IT AWARDS GRANTS TO THOSE EDUCATIONAL FACILITIES THAT CREATE NEW WETLAND RESEARCH INITIATIVES. THIS YEAR, THE FOUNDATION AWARDED TWO GRANTS TO VIRGINIA TECHNOLOGICAL INSTITUTE AND CHRISTOPHER NEWPORT UNIVERSITY.

TO FORM 990-PF, PART IX-A, LINE 1

## EXPENSES

474,981.

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FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 10
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ACTIVITY THREE

THE PETERSON FAMILY FOUNDATION IS DEDICATED TO HELP INDIVIDUALS OF LIMITED FINANCIAL RESOURCES. THE FOUNDATION HAS BEEN AFFILIATED WITH A CHURCH IN LA ROMANA, DOMINICAN REPUBLIC. THE FOUNDATION BUILT AND IS OPERATING A CHURCH RELATED DAYCARE/EDUCATION CENTER. THE PURPOSE OF THE CENTER IS TO FEED CHILDREN OF LA ROMANA BEFORE AND AFTER SCHOOL, PROVIDE A PLAYGROUND AREA FOR THEM TO USE AFTER SCHOOL AND TO PROVIDE ADDITIONAL EDUCATION ASSISTANCE TO SUCH CHILDREN. THE PROGRAM CURRENTLY FEEDS AND EDUCATES 250 CHILDREN.

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EXPENSES

TO FORM 990-PF, PART IX-A, LINE 3

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91,100.

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FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT 11
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NAME OF MANAGER

MILTON V. PETERSON  
LAUREN P. FELLOWS  
WILLIAM E. PETERSON  
CAROLYN S. PETERSON  
JON M. PETERSON  
STEVEN B. PETERSON

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FORM 990-PF	PART XV - LINE 1B LIST OF FOUNDATION MANAGERS	STATEMENT 12
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NAME OF MANAGER

MILTON V. PETERSON  
LAUREN P. FELLOWS  
WILLIAM E. PETERSON  
CAROLYN S. PETERSON  
JON M. PETERSON  
STEVEN B. PETERSON

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 13

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

BLANCA R. RAMOS  
12500 FAIR LAKES CIRCLE, SUITE 400  
FAIRFAX, VA 22033

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

(703) 631-7541

NO SPECIFIC GRANT PROGRAM

FORM AND CONTENT OF APPLICATIONS

PURPOSE FOR WHICH FUNDS ARE SOLICITED, AMOUNT OF FUNDS SOLICITED, COPY OF  
MOST RECENT FORM 990 AND IRS DETERMINATION LETTER IF APPLICABLE

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE

PETERSON FAMILY FOUNDATION 2009 CONTRIBUTIONS				
Name	Name Address	SSN/Tax ID	Year	Debit
Alexandria Symphony Orchestra	2121 Eisenhower Avenue Suite 608 Alexandria, VA 22314	54-0805937	2009	700 00
American Heart Association	Mid-Atlantic Affiliate 4217 Park Place Court Glen Allen, VA 23060	13-5613797	2009	2,500 00
Arts Council of Fairfax County	International Children's Festival 4022 Hummer Road Annandale, VA 22003	54-0784570	2009	1,000 00
Autism Speaks	5455 Wilshire Blvd Suite 2250 Los Angeles, CA 90036	20-2329938	2009	1,250 00
Capital Hospice	Carol Kennedy, CFRE 2900 Teleslar Court Falls Church, VA 22042	54-1920770	2009	4,250 00
Carpenter's Shelter	930 North Henry Street Alexandria, VA 22314 Attn Frances Becker	54-1571849	2009	1,500 00
Central Union Mission	P O Box 96763 Washington, DC 20077	53-0218650	2009	200 00
Charity Works Fund	1616 Anderson Road Suite 209 McLean, VA 22102	51-0232459	2009	10,000 00
Christian Stewardship Ministries	Attn Ken Smith 10523 Main Street Suite 200	52-1238774	2009	500 00
Clifton Lions Club	7207 Main Street Clifton, Virginia 20124-0225 Attn Jim Chesley	54-1743126	2009	500 00
Duke University	Attn Robert Shepard 225 Allen Building Box 90032	56-0532129	2009	25,000 00
Easter Seals	1420 Spring Street Silver Spring, MD 20910	53-0212296	2009	1,000 00
Fairfax Co Public Library	12000 Government Center Pkwy Suite 329 Fairfax, VA 22035	54-1874412	2009	1,000 00
Fairfax Symphony Orchestra	3905 Railroad Avenue Suite 202N Fairfax, VA 22030	54-6052893	2009	3,000 00
Fairfax United Methodist Church	10300 Stratford Avenue Fairfax, VA 22030-3217 Attn Art Looney	54-0616475	2009	35,000 00
First Parish Church	180 York Street York, ME 03909	01-0263518	2009	8,500 00
Floris United Methodist Church	13600 Frying Pan Rd Herndon, VA 20171	91-0850229	2009	10,000 00
Fort Hunt Youth Athletic Association	8502 Crown Place Alexandria, VA 22308	54-6053473	2009	120 00
George Mason University Foundation, Inc	Attn Tracy D Lee Associate Dean for Development 4400 University Drive M/S 4C1	54-1603842	2009	5,000 00
Gleaning For The World	Attn Rev Ronald Davidson 7539 Slage Rd PO Box 645	54-1930105	2009	15,000 00
GLENKIRK ES PTO	8584 Sedge Wren Drive Gainesville, VA 20155	13-4309524	2009	300 00
Greenpeace Fund	Greenpeace Fund 702 H Street, NW Suite 300	95-3313195	2009	250 00
Hospice of the Piedmont	675 Peter Jefferson Parkway Suite 300 Charlottesville, VA 22911	58-1453827	2009	500 00
Inova Health System Foundation	8110 Gatehouse Road Suite 200E Falls Church, VA 22042-9957	54-1071867	2009	231,452 00
Jatukik Providence Foundation	1875 I Street, NW Suite 563 Washington, DC 20006	20-1006610	2009	500 00
Leadership Arlington	2009 N 14th St Suite 111 Arlington, VA 22201	54-1907862	2009	1,000 00
Life With Cancer	8411 Pennell Street Fairfax, VA 22031	54-1071867	2009	5,713 90
Northern Virginia Conservation Trust	Saving Nearby Nature 4022 Hummer Road Annandale, VA 22003	54-1724626	2009	2,500 00
Northern Virginia Family Service	Attn Sarah Clark 10455 White Granite Drive Suite 100	54-0791977	2009	15,000 00
Patricia M Sitar Center for the Arts	1700 Kalorama Road, NW Suite 101 Washington, DC 20009-3573	52-2113471	2009	1,000 00
Prevent Cancer Foundation	1600 Duke Street Suite 500 Alexandria, VA 22314	52-1429544	2009	8,500 00
Ronald McDonald House	1326 Quincy Street, NE Washington, DC 20017	52-1132262	2009	1,500 00
Special Olympics Virginia	PO Box 90019 Richmond, VA 23225-9019	54-1013637	2009	500 00
St Coletta of Greater Washington	1901 Independence Avenue, SE Washington, DC 20003	54-0968224	2009	500 00
St Stephen's & St Agnes School	400 Fontaine Street Alexandria, VA 22302-9912 Attn Annual Giving Fund	54-6054009	2009	600 00

PETERSON FAMILY FOUNDATION 2009 CONTRIBUTIONS				
Name	Name Address	SSN/Tax ID	Year	Debit
The Art League	105 North Union Street Alexandria, VA 22314	54-0833818	2009	10,000 00
The Baldwin School	701 Montgomery Ave Bryn Mawr, PA 19010	23-1352619	2009	5,000 00
The Child and Family Network Centers	3701 A Mt Vernon Avenue Alexandria, VA 22305	54-1589809	2009	5,000 00
The Community Foundation For The National	Capital Region Alexandria Community Trust 311 Cameron Street	23-7343119	2009	3,500 00
The First Tee Of Washington, DC	Langston Golf Course 2020 Pennsylvania Ave NW #106	52-2195691	2009	1,000 00
The Posse Foundation	1612 K Street N W Suite 1002 Washington, DC 20006	13-3840394	2009	1,500 00
The UCLA Foundation	Office of Development/Ami Shilton 110 Westwood Plaza, F315 Box 951481	95-2250801	2009	12,000 00
The Walters Art Museum	600 North Charles Street Baltimore, MD 21201-5185	52-1194738	2009	1,000 00
United Way Of The National Capital	c/oRainbow Center, 4-H Therapeutic Equestrian Program 8033 Ashton Ave, Suite 105	53-0234290	2009	5,000 00
Venture Philanthropy Partners	Attn Eleanor Rutland 1201 15th Street NW Suite 420	31-1713618	2009	50,000 00
Virginia Foundation for Indep Colleges	8010 Ridge Road Suite B Richmond, VA 23229-7288	54-0554396	2009	1,000 00
Virginia Tech Foundation	Ms Kim M Chnslopoulos Director of Donor Relations MC 0336	54-0554396	2009	25,000 00
Washington International Horse Show	3299 K ST NW Suite 600 Washington, DC 20007	53-0260530	2009	10,000 00
Westmoreland Davis Found	41793 Tutti Lane Leesburg, VA 20176	54-0737425	2009	8,000 00
WETA	Att Sara Trautman - Yegenoglu 2775 South Quincy Sreet Arlington, VA 22206	53-0242992	2009	1,800 00
WOODLAWN FOUNDATION	POPE-LEIGHEY HOUSE PO BOX 15097 ALEXANDRIA , VA 22309	52-1325878	2009	150 00
York Hospital	15 Hospital Drive York, ME 03909	01-0212444	2009	125,685 10
York Public Library	15 Long Sands Road York, Maine 03909	01-0360256	2009	500 00
Youth For Tomorrow	11835 Hazel Circle Drive Bristow, VA 20136	52-1342268	2009	16,500 00
				<b>678,471.00</b>



# Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**

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

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

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

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

Type or print	Name of Exempt Organization	Employer identification number
	THE PETERSON FAMILY FOUNDATION, INC.	54-1870812
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions.	
	12500 FAIR LAKES CIRCLE SUITE 400	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	FAIRFAX, VA 22033	

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

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

BLANCA R. RAMOS

- The books are in the care of ► 12500 FAIR LAKES CIRCLE, STE 400 - FAIRFAX, VA 22033  
Telephone No ► (703) 631-7541 FAX No ►

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

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
► ☒ calendar year 2009 or  
► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	20,815.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

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

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

Form 8868 (Rev 4-2009)