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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

OMB No 1545-0052

2009

For_	calen	idar year 2009, or tax yea	r beginning		, and ei	nding		-
G (heck	all that apply	Initial return	Initial return of a fo	•	harity	Final retur	n
			Amended return	Address chan	ge		Name change	
Use	the I	IRS Name of foundation					A Employer identificatio	n number
	abel.	. NORMAN E I		DIANA LAGER P	ETERSO:	N		
Oth	erwi	se, EDUCATIONA	AL FUND INC				59-2749952	2
	print	1	O box number if mail is not d	elivered to street address)		Room/suite	B Telephone number	
	r type	F	HER BOW				941-379-78	806
	Spec ructio	j Gily of town, State, a					C If exemption application is	pending, check here
11121	ruciii	SARASOTA,					D 1. Foreign organization	ns, check here 🕨 🗀
H (heck	type of organization	X Section 501(c)(3) e	xempt private foundation			Foreign organizations makes here and attach of the control of	neeting the 85% test, pomputation
	Se	ction 4947(a)(1) nonexem	npt charitable trust	Other taxable private founda	ation		E If private foundation st	atus was terminated
l Fa	iir ma	arket value of all assets at e	end of year J Account	ing method X Cash	Accr	ual	under section 507(b)(1	1)(A), check here
		Part II, col (c), line 16)		ther (specify)			F If the foundation is in a	60-month termination
	•\$			ımn (d) must be on cash i	basis.)		under section 507(b)(1	1)(B), check here 🕒 🗀
Pa	irt i	Analysis of Revenue an (The total of amounts in colu	nd Expenses Imns (b), (c), and (d) may not	(a) Revenue and		vestment	(c) Adjusted net	(d) Disbursements for chantable purposes
	1	necessarily equal the amoun	nts in column (a))	expenses per books	inco	me	income	(cash basis only)
	1	Contributions, gifts, grant					N/A	
	2	Check ► X If the foundation						
	3	Interest on savings and tempo cash investments	orary					
	4	Dividends and interest fro	om securities	30,230.	3	0,230.		STATEMENT 1
	5a	Gross rents				····		
	b	Net rental income or (loss)				Bohnmann .	Marie	· 444
<u>o</u>	6a	Net gain or (loss) from sale of		<5,261.	>		KHCKIVI-I)	
Revenue	b	Gross sales price for all assets on line 6a	74,209.			1 1 2 2	min de commente es e e e e e e e	(2)
ě	7	Capital gain net income (from	Part IV, line 2)			w 0 ⋅	SEP 2 7 2016	8
-	8	Net short-term capital gai	ın			183	37C1 2 1 CO10	6
	9	Income modifications	1)底
	10a	Gross sales less returns and allowances				(IGDEN UT	
	b	Less Cost of goods sold				<u></u>		
	C	Gross profit or (loss)		400				
	11	Other income		409.		0.		STATEMENT 2
	12	Total. Add lines 1 throug	<u>ıh 11 </u>	25,378.	3	0,230.		
	13	Compensation of officers, dire	• • • • • •	0.		0.		0
	14	Other employee salaries a	•					
Š	15	Pension plans, employee	_	450				450
enses	1	Legal fees	STMT 3 STMT 4	450.		0.		450
Kpe	þ	Accounting fees		1,500.		0.		1,500
Operating and Administrative Exp	C	Other professional fees	STMT 5	7,313.		7,313.		0
Ě	17	Interest	CMMM 6	423.		422		<u> </u>
stra	18	Taxes	STMT 6	423.	<u> </u>	423.		0
Ë	19	Depreciation and depletion	on				 	<u> </u>
þ	20	Occupancy					 	
P	21	Travel, conferences, and			<u> </u>		<u> </u>	
au	22	Printing and publications		<u> </u>				<u> </u>
ij	23	Other expenses	STMT 7	61.	l	0.		61
era'	24	Total operating and adm		0.747		7 726		2 011
ŏ		expenses. Add lines 13 t		9,747. 51,250.		7 , 736.		2,011 51,250
-	L	Contributions, gifts, gran	•	31,250.	<u> </u>	•		31,250
	26	Total expenses and disb	ursements.	60 007		7 726		E2 201
_	0~	Add lines 24 and 25	- 40	60,997.		7,736.		53,261
	27			25 610				
	Į.	Excess of revenue over exper		<35,619.		2 404	· · · · · · · · · · · · · · · · · · ·	
		Net investment income (2,494.		-
9235		Adjusted net income (if n		- 0 - 4 N - 4	<u> </u>		N/A	5 000 DE :
02-0	01 2-10	LMA FOR PRIVACY ACT &	anu raperwork Keductioi	n Act Notice, see the instruc	ILIONS.			Form 990-PF (2009

EDUCATIONAL FUND INC

59-2749952

Page 2

1 Cash - non-interest-bearing 1 Sange - non-interest 1 Sange - non-interest-bearing 1 Sange - non-interest 1	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	End of year			
Savenges and temporary cash investments 3. Accounts receivable Less allowance for doubtful accounts Less allowance for doubtful accounts 5. Grants receivable 6. Receivables due from officers, directors, fusites, and other disqualified persons 7. One ricks active insense in the state of the state	Part	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value			
Accounts receivable Less allowance for doubtful accounts Less allowance allowance for doubtful accounts Less allowance all	1	Cash - non-interest-bearing	15,827.	20,324.	20,324.			
Less allowance for doubtful accounts 4 Pledges receivable Less allowance for doubtful accounts 5 Grants receivable 6 Receivable 25 Grants receivable 26 Receivable 27 Own row down receivable 28 Investments - Oxford doubtful accounts 3 Investments - Oxford doubtful accounts 4 Pledges receivable 20	2	Savings and temporary cash investments						
Pleague receivable Less allowance for doubtful accounts 5 Grants receivable 6 Receivables due from officers, directors, trustees, and other discquiffed persons 7 Dour receivable 8 Inventiones for sale or use 9 Prepard expenses and other red charges 10s Inventiones for sale or use 10s Inventiones for sale or use 10s Inventiones for sale or use 10s Inventiones to sale or use 11 Investments - comporate bonds 11 Investments - comporate bonds 11 Investments - comporate bonds 12 Investments - comporate bonds 12 Investments - comporate bonds 13 Investments - comporate bonds 13 Investments - comporate bonds 14 Land, bundangs, and equipment basis 15 Other assets (to be completed by all filters) 16 Total assets (to be completed by all filters) 17 Accounts payable and accrued expenses 18 Grants payable and accrued expenses 19 Deferrance and other notes payable 10 Lears from officers, directors, flustees, and other dequaled persone 21 Montgages and other notes payable 22 Total labelities (describe 23 Total labelities (describe 24 Total intensity restricted 25 Temporarily restricted 26 Permanenty restricted 27 Fernancenty restricted 28 Permanenty restricted 29 Related earnings, accumulated income, endowment, or other funds 20 Permanenty restricted 20 Permanenty restricted 21 Total intensities and net assets from thalsances 1 Total intensities and enter seeds from the seasons from the	3	Accounts receivable						
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disqualified persons	6	Receivables due from officers, directors, trustees, and other						
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b Investments - corporate stock STMT 9	ĕ 10a	Investments - U.S. and state government obligations. STMT 8	99,447.	99,447.	106,875.			
e investments - corporate bonds 11 investments - mortgage loans 12 investments - mortgage loans 13 investments - mortgage loans 13 investments - onter 14 Land, buildings, and equipment basis 15 Other assets (describe 16 Total assets (describe 17 Accounts payable and accrued expenses 18 Grants payable 20 Loase from cincon, mustless, and other desqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe 23 Total liabilities (describe 24 Unrestricted 25 Temporarily restricted 26 Pearmenetly restricted 27 Capital stock, trust principal surplus, or land, bidg, and equipment fund 28 Padr-in or capital surplus, or land, bidg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total liabilities and not fullow SFAS 117, check here 29 Padr-in or capital surplus, or land, bidg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total liabilities and not assets/fund balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1 1,052,721. 1 1,013,514. 1 1,052,721. 1 1,013,514.	I	~~~~	534,146.	595,283.				
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Investments - mortgage loans Investments - other STMT 11 230,110 . 109,117 . 83,426 .	11	Investments - land, buildings, and equipment basis			1110 1111 1111			
13 Investments - other		Less: accumulated depreciation]	Ì				
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15 Other assets (describe 1,052,721. 1,013,514. 1,078,978.	13	Investments - other STMT 11	230,110.	109,117.	83,426.			
15 Other assets (describe 1,052,721. 1,013,514. 1,078,978. 16 Total assets (to be completed by all filers)	14	Land, buildings, and equipment basis						
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19 Deferred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe	17	Accounts payable and accrued expenses						
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Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 1 Total liabilities and net assets/fund balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	_ 22	Other liabilities (describe						
Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 1 Total liabilities and net assets/fund balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.		-		0				
and complete lines 24 through 26 and lines 30 and 31. Unrestricted Temporarily restricted Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. Capital stock, trust principal, or current funds Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.			U •	<u> </u>				
24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Temporarily restricted 28 Permanently restricted 29 Permanently restricted 29 Permanently restricted 20 Permanently restricted 20 Permanently restricted 21 Total liabilities and net assets/fund balances 22 Paid-in or capital surplus, or land, bldg, and equipment fund 23 Retained earnings, accumulated income, endowment, or other funds 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 31 Total liabilities and net assets/fund balances 31 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.								
31 Total liabilities and net assets/fund balances 1,052,721. 1,013,514. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	S CA	•						
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31 Total liabilities and net assets/fund balances 1,052,721. 1,013,514. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	ō 27		0	0				
31 Total liabilities and net assets/fund balances 1,052,721. 1,013,514. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	ets 28	•						
31 Total liabilities and net assets/fund balances 1,052,721. 1,013,514. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	ASS 29							
31 Total liabilities and net assets/fund balances 1,052,721. 1,013,514. Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	를 30 20							
Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	2 30	Total Not account of family buildings	2,002,121	2,020,0210				
Part III Analysis of Changes in Net Assets or Fund Balances 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	31	Total liabilities and net assets/fund balances	1,052,721.	1,013,514.				
1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) 1 1,052,721.								
(must agree with end-of-year figure reported on prior year's return) 1 1,052,721.	Part	THE Allalysis of Changes III Net Assets of Fullu L						
	1 Tota	al net assets or fund balances at beginning of year - Part II, column (a), line	30					
2 Enter amount from Part Line 27a and 1 4 25 610 3	-	· · · · · · · · · · · · · · · · · · ·		- 1				
· · · · · · · · · · · · · · · · · · ·		er amount from Part I, line 27a		2	<35,619.>			
3 Other increases not included in line 2 (itemize)								
4 Add lines 1, 2, and 3 4 1,017,102.			D THOMASSIC					
5 Decreases not included in line 2 (itemize) PRIOR PERIOD ADJUSTMENT 5 3,588.								
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 1,013,514. Form 990-PF (2009)	<u>o 10ta</u>	ai net assets or tund balances at end of year (line 4 minus line 5) - Part II, c	ojumn (b), line 30	[6				

Part IV Capital Gains a	nd Losses for Tax on Ir	nvestment	Income					
	e the kind(s) of property sold (e g house, or common stock, 200 sh			` P	low acquired - Purchase - Donation	(c) Date ((mo , d	acquired ay, yr)	(d) Date sold (mo , day, yr)
1a SEE STMT ATTACH	ED				P		7	
b SEE STMT ATTACH					P			
c CAPITAL GAINS D	IVIDENDS		-				-	
d								
е								
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis xpense of sale				ain or (loss s (f) minus	
a 32,249.			36,90	0.				<4,651.
b 41,822.			42,57					<748.
c 138.								138.
d								
e								
Complete only for assets showing	gain in column (h) and owned by	the foundation	on 12/31/69			(I) Gains (C	ol (h) gain	minus
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of cot (i)			òl (k), but r	not less that (from col. (n -0-) ar
		****	33. (),,,					<4,651
<u>a</u>								<748.
<u>b</u>				\dashv				138.
<u>C</u>		-						130
d j								
<u>e</u>		.l						
! Capital gain net income or (net capi	If gain, also ente If (loss), enter -0			}	2			<5,261
Net short-term capital gain or (loss)) as defined in sections 1222(5) ai	nd (6)						
If gain, also enter in Part I, line 8, co	olumn (c)						/-	
Part V Qualification Un	der Section 4940(e) for			ال	_3		N/A	
Vas the foundation liable for the section if "Yes," the foundation does not qualify			•	riod?				Yes X No
1 Enter the appropriate amount in ea	ch column for each year, see insti	ructions before	making any entri	es				
(a) Base period years Calendar year (or tax year beginning	(b) Adjusted qualifying dis	stributions	Net value of no	(c) ncha	ritable-use asset	ts		(d) bution ratio vided by col (c))
2008	5	1,252.		1	,122,34	3.		.045665
2007		55,114.	• • • • • • • • • • • • • • • • • • • •		,300,31			.050076
2006		4,150.			,246,83			.035410
2005		5,900.			,218,45			.03767
2004		4,500.			,239,97			.043952
2 Total of line 1, column (d)		•				2		.212774
3 Average distribution ratio for the 5- the foundation has been in existence		on line 2 by 5,	or by the number	of ye	ears	3		.042555
	•	luna E						999,818
Enter the net value of noncharitable	-use assets for 2009 from Par X,	, iiii				4		-
Multiply line 4 by line 3						5		42,547
5 Enter 1% of net investment income	(1% of Part I, line 27b)					6		225
7 Add lines 5 and 6						7		42,772
8 Enter qualifying distributions from						8		53,261
If line 8 is equal to or greater than I See the Part VI instructions	ine 7, check the box in Part VI, line	e 1b, and comp	olete that part usir	ng a 1	% tax rate			000 00
923521 02-02-10							f	orm 990-PF (2009

X

7

8b

10

7 Did the foundation have at least \$5,000 in assets at any time during the year?

8a Enter the states to which the foundation reports or with which it is registered (see instructions)

of each state as required by General Instruction G? If "No," attach explanation

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)

year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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

If "Yes," complete Part II, col (c), and Part XV

0111	1930 IT (2009) EDUCATIONAL FUND INC	133 <u>Z</u>	<u>'</u>	age
Pa	art 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?	13	X	
	Website address ► N/A		•	
14	The books are in care of ► DIANA LAGER Telephone no ► (941)	379-	-78	06_
	Located at ► 2921 HEATHER BOW, SARASOTA, FL ZIP+4 ►34	1235	-72	02
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		>	
	and enter the amount of tax-exempt interest received or accrued during the year	N.	/ <u>A</u>	
PE	art 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
1 a	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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available			
	for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			
	If the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)		- 1	
	• • • • • • • • • • • • • • • • • • • •		1	
L	olf 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)? N/A	1.	1	
	, , , , , , , , , , , , , , , , , , , ,	1b		
	Organizations relying on a current notice regarding disaster assistance check here 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?	10	1	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))			
2	i. 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 ▶ , , , ,			
t	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		
0	: If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
	>			
32	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year? $igsquare$ Yes $igsquare$ No			
t	ı 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	_	<u> </u>
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
t	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		<u> X</u>
	Fo	rm 990	-PF (2009)

NORMAN E PETERSON & DÍAN OTT 990-PF (2009) EDUCATIONAL FUND INC	A LAGER PETER		59-27499	
Part VII-B Statements Regarding Activities for Which F	orm 4720 May Be F	Required (contin	ued)	
 5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section (2) Influence the outcome of any specific public election (see section 4955), o 	. "		s X No	
any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes	?	Ye	es X No	
 (4) Provide a grant to an organization other than a charitable, etc., organization 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary. 			es X No	
the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unc	, , ,	Ye	s X No	
section 53 4945 or in a current notice regarding disaster assistance (see instru Organizations relying on a current notice regarding disaster assistance check h	ctions)?	3	N/A ►□	5b
c if the answer is "Yes" to question 5a(4), does the foundation claim exemption for expenditure responsibility for the grant?	N	ined Ye	es 🔲 No	
If "Yes," attach the statement required by Regulations section 53 4945Did the foundation, during the year, receive any funds, directly or indirectly, to a personal benefit contract?	• •	Ye	es X No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p If "Yes" to 6b, file Form 8870.		[es X No	6b X
7a At any time during the tax year, was the foundation a party to a prohibited tax s b If yes, did the foundation receive any proceeds or have any net income attribute		TE	/-	7b
Part VIII Information Apple Control of Contr		nagers, Highly		<u>,, </u>
Paid Employees, and Contractors				
List all officers, directors, trustees, foundation managers and their	(b) Title, and average	(c) Compensation	(d) Contributions to	(a) Evnence
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation	(e) Expense account, other allowances
	0.00	0.	0.	0.
Compensation of five highest-paid employees (other than those inc	,	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				
				0
Cotal number of other employees hald over \$50 000				()

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Paid Employees, and Contractors (continued) 3 Five highest-paid independent contractors for professional services. If none, enter "NONE."		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE	(b) Type of Service	(c) compensation
HONE		
· · · · · · · · · · · · · · · · · · ·		-

Total number of others receiving over \$50,000 for professional services		▶ 0
Part IX-A Summary of Direct Charitable Activities		
	van aviah aa éha	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical informat number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	ion such as the	Expenses
1 N/A		
1		
Λ		
2		
^		
3		
4		
Port IV R Common of Decree Deleted Investments		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	·	Amount
27/2	· ·	Amount
1 N/A		
^		
2		
All the second of the second o		
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3	<u>▶</u>	0.

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
а	Average monthly fair market value of securities	1a	996,763.
	Average of monthly cash balances	1b	18,076.
	Fair market value of all other assets	10	. 205.
d	Total (add lines 1a, b, and c)	1d	1,015,044.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,015,044.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	15,226.
5	Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4	5	999,818.
6_	Minimum investment return. Enter 5% of line 5	6	49,991.
p	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part (d certain	
1	Minimum investment return from Part X, line 6	1	49,991.
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	225.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	49,766.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	49,766.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	49,766.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	53,261.
b		1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	53,261.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income Enter 1% of Part I, line 27b	5	225.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	53,036.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (4940(e) reduction of tax in those years	qualifies fo	or the section

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		+		49,766.
2 Undistributed income, if any, as of the end of 2009			12 070	
a Enter amount for 2008 only			13,870.	
b Total for prior years				
5	1-1'	0.	., , ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	······································
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007			1	
e From 2008	0.			
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from				
Part XII, line 4 ▶\$ 53,261.			12 070	
a Applied to 2008, but not more than line 2a			13,870.	 -
b Applied to undistributed income of prior		0.		
years (Election required - see instructions)		V •		
c Treated as distributions out of corpus	0.			
(Election required - see instructions)		***************************************		39,391.
d Applied to 2009 distributable amount	0.			39,391.
e Remaining amount distributed out of corpus	0.			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:				
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				10,375.
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				5 000 DE (0000)

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Part XIV Private Operating F	oundations (see ins		A guestion 9)	N/A	-2/49932 raye 10
1 a If the foundation has received a ruling of			7, 90031011 0)	N/A	
foundation, and the ruling is effective for					
b Check box to indicate whether the found	•	•	section	4942(j)(3) or [4942(J)(5)
2 a Enter the lesser of the adjusted net	Tax year	g louiluation described ii	Prior 3 years	3 4942(J)(3) UI L	1 4342())(3)
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
investment return from Part X for	(2) 2000	(8) 2000	(5) 2007	- (2) 2000	(0) 10.21
					i
each year listed				 	
b 85% of line 2a					
c Qualifying distributions from Part XII,	:				
line 4 for each year listed		_	<u></u>		
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities					
e Qualifying distributions made directly					
for active conduct of exempt activities					
Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return					
shown in Part X, line 6 for each year					
listed					
c "Support" alternative test - enter					
(1) Total support other than gross			-		
investment income (interest, dividends, rents, payments on					
securities loans (section					
512(a)(5)), or royalties)					
(2) Support from general public			•		
and 5 or more exempt organizations as provided in					,
section 4942(J)(3)(B)(III)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					
Part XV Supplementary Info			if the foundatio	n had \$5,000 o	r more in assets
at any time during t	he year-see the i	nstructions.)			
1 Information Regarding Foundation	•				
a List any managers of the foundation wh year (but only if they have contributed n			ributions received by th	e foundation before t	he close of any tax
	note than \$5,000) (See S	ection 507 (d)(2))			
NONE	400/				<u> </u>
b List any managers of the foundation wh other entity) of which the foundation ha			or an equally large por	tion of the ownership	of a partnership or
NONE	o a roza or gradior mioro.	•			
2 Information Regarding Contribut	ion Grant Gift Loan	Scholarship etc. Dr	oarame:		
Check here ► ☐ If the foundation of			•	not accept uncollecte	d requests for funds. If
the foundation makes gifts, grants, etc					
a The name, address, and telephone num	<u> </u>	<u>_</u>		F	.,,,
DIANA LAGER	ber of the person to who	n applications should be	aud103300		
2921 HEATHER BOW, SA	RASOTA, FL	34235			
b The form in which applications should b			nould include		
c Any submission deadlines NONE					
d Any restrictions or limitations on award	s, such as by geographic	al areas, charitable fields,	kinds of institutions, o	r other factors	
N/A					
923601 02-02-10					Form 990-PF (2009)

Form 990-PF (2009) EDUCATIONAL FUND INC

59-2749952 Page 11

Part XV Supplementary Informatio			35 271	
3 Grants and Contributions Paid During the	Year or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year				
		1		
SEE STATEMENT 12				
Total	<u> </u>	.,	► 3a	51,250
b Approved for future payment				
NONE				
Total			▶ 3b	0
923611 02-02-10			F	orm 990-PF (2009

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

	i		76	led by section 512, 513, or 514	(e)
Program service revenue	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
a					
b					
·	1 1				
1					
e	1				
g Fees and contracts from government agencies					
Membership dues and assessments					
nterest on savings and temporary cash					
nvestments					
Dividends and interest from securities			14	30,230.	
Net rental income or (loss) from real estate					7 1 1
a Debt-financed property					
Not debt-financed property					
Net rental income or (loss) from personal					
property					
Other investment income					
Gain or (loss) from sales of assets other					<u>.</u>
than inventory	İ		18	<5,261.	>
Net income or (loss) from special events	-			10/2020	
Gross profit or (loss) from sales of inventory					
Other revenue					
a TAX REFUND			01	409.	
			01	107.	
b	I				
^					
	I				
d	I				
de	I	0		25 378	
d e Subtotal Add columns (b), (d), and (e)	I	0.		25,378.	
d Bubtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations	3)			13	
Subtotal Add columns (b), (d), and (e) Fotal Add line 12, columns (b), (d), and (e) E worksheet in line 13 instructions to verify calculations Relationship of Activitie	es to the Acce	omplishment of Ex	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations Relationship of Activitie	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie ne No. Explain below how each activity for which i	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie ne No. Explain below how each activity for which i	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie ne No. Explain below how each activity for which i	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie ne No. Explain below how each activity for which i	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie ne No. Explain below how each activity for which i	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie ne No. Explain below how each activity for which i	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Fotal Add line 12, columns (b), (d), and (e) E worksheet in line 13 instructions to verify calculations BET XVI-B Relationship of Activitie ReNo. Explain below how each activity for which in	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Fotal Add line 12, columns (b), (d), and (e) E worksheet in line 13 instructions to verify calculations Forat XVI-B Relationship of Activitie Re No. Explain below how each activity for which in	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Fotal Add line 12, columns (b), (d), and (e) E worksheet in line 13 instructions to verify calculations BREATT XVI-B Relationship of Activitie ReNo. Explain below how each activity for which in	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Fotal Add line 12, columns (b), (d), and (e) E worksheet in line 13 instructions to verify calculations BREATT XVI-B Relationship of Activitie ReNo. Explain below how each activity for which in	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
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Subtotal Add columns (b), (d), and (e) Fotal Add line 12, columns (b), (d), and (e) E worksheet in line 13 instructions to verify calculations BET XVI-B Relationship of Activitie ReNo. Explain below how each activity for which in	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Fotal Add line 12, columns (b), (d), and (e) E worksheet in line 13 instructions to verify calculations Forat XVI-B Relationship of Activitie Re No. Explain below how each activity for which in	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
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Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie ne No. Explain below how each activity for which i	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37
Subtotal Add columns (b), (d), and (e) Total Add line 12, columns (b), (d), and (e) we worksheet in line 13 instructions to verify calculations Part XVI-B Relationship of Activitie The No. Explain below how each activity for which is	es to the Acco	omplishment of Exincolumn (e) of Part XVI-A	kemp	13 t Purposes	25,37

Form 99		N E PETERSO TIONAL FUND	N & DIANA LAGER F INC		49952	Pa	ige 13
	XVII Information R	egarding Transfer		nd Relationships With Nonc			.go 10
1 Di	Exempt Organ		e following with any other organization	I described in section 501(c) of		Yes	No
	· ·		ection 527, relating to political organization	· •		.03	140
	ansfers from the reporting found		- · · · · · · · · · · · · · · · · · · ·				
) Cash		. 3		1a(1)		X
) Other assets				1a(2)		Х
b Ot	her transactions						
(1) Sales of assets to a noncharita	ible exempt organization			1b(1)		X
(2) Purchases of assets from a no	ncharitable exempt organ	ızatıon		1b(2)		X
(3) Rental of facilities, equipment,	or other assets			1b(3)		X
•) Reimbursement arrangements	;			1b(4)		X
•) Loans or loan guarantees				1b(5)		X
) Performance of services or me				1b(6)		X
	iaring of facilities, equipment, ma				10		X
				ays show the fair market value of the good in any transaction or sharing arrangemei		ets,	
CO	lumn (d) the value of the goods,	other assets, or services i	received				
(a) Line	no (b) Amount involved		charitable exempt organization	(d) Description of transfers, transactions,	and sharing an	rangeme	ents
			N/A				
		<u> </u>					
	 						
	· · · · · · · · · · · · · · · · · · ·						
	the foundation directly or indirect section 501(c) of the Code (other		d to, one or more tax-exempt organiza or in section 527?	ations described	Yes	X	☐ No
<u>b</u> If	"Yes," complete the following sch		100-				
	(a) Name of or	ganization	(b) Type of organization	(c) Description of relati	onship		
	N/A						
							
				ents, and to the best of my knowledge and belief,	it is true, come	ct,	
and	Minipiete Declaration of preparer (oth	er man taxpayer or nouclary) is	based on all information of which preparer h	ias any knowledge			
<u>و</u>	Signature of officer or trustee	age	7/23 / 10	Title			

Preparer's identifying number

860 561-4000

BLUM, SHAPIRO & COMPANY, P.C., CPA 29 S. MAIN STREET, P.O. BOX 272000 WEST HARTFORD, CT 06127-2000

Preparer's signature

Check if self-employed

EIN 🕨

Phone no

FORM 990-PF DIVIDEND	S AND	INTER	EST FROM	SEC	JRITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		PITAL GAINS DIVIDENDS	COLUMN (A AMOUNT)
OTHER US GOVERNMENT			25,141. 5,227.		138.	25,0 5,2	
TOTAL TO FM 990-PF, PART I, I	N 4 =		30,368.		138.	30,2	30.
FORM 990-PF	OT	HER II	NCOME			STATEMENT	2
DESCRIPTION		1	(A) REVENUE PER BOOK		(B) NET INVEST- MENT INCOME	(C) ADJUSTE NET INCO	
TAX REFUND				409.	0	•	
TOTAL TO FORM 990-PF, PART I,	LINE	11 =		409.	0	•	
FORM 990-PF		LEGAL	FEES			STATEMENT	3
DESCRIPTION	(A EXPEN PER B	ISES	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
LEGAL FEES		450.		0	•	4	50.
TO FM 990-PF, PG 1, LN 16A		450.		0	•	4	50.
FORM 990-PF	ACC	COUNTI	NG FEES	-		STATEMENT	4
DESCRIPTION	(A EXPEN PER E	ISES	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
DESCRIPTION							
ACCOUNTING FEES	1	,500.		0	•	1,5	00.

FORM 990-PF O	THER PROFES	SIONAL FEES	S	TATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AGENCY FEES	7,313.	7,313.		0.
TO FORM 990-PF, PG 1, LN 16C	7,313.	7,313.		0.
FORM 990-PF	TAX	ES	S	ratement 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	423.	423.		0.
TO FORM 990-PF, PG 1, LN 18	423.	423.		0.
FORM 990-PF	OTHER E	XPENSES	S	ratement 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEE	61.	0.		61.
TO FORM 990-PF, PG 1, LN 23	61.	0.		61.

FORM 990-PF U.S. AND ST	ATE/CITY GOVERNMENT	OBLIGATIONS	STATEMENT 8
DESCRIPTION	U.S. OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US GOVT	<u>x</u>	99,447.	106,875.
TOTAL U.S. GOVERNMENT OBLIGATION	ons	99,447.	106,875.
TOTAL STATE AND MUNICIPAL GOVE	RNMENT OBLIGATIONS		
TOTAL TO FORM 990-PF, PART II,	LINE 10A	99,447.	106,875.
FORM 990-PF	CORPORATE STOCK		STATEMENT 9
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
STOCKS	•	595,283.	683,035.
TOTAL TO FORM 990-PF, PART II,	LINE 10B	595,283.	683,035.
FORM 990-PF	CORPORATE BONDS		STATEMENT 10
DESCRIPTION	•	BOOK VALUE	FAIR MARKET VALUE
BONDS	•	189,138.	185,113.
TOTAL TO FORM 990-PF, PART II,	LINE 10C	189,138.	185,113.
FORM 990-PF	OTHER INVESTMENTS		STATEMENT 11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER INVESTMENTS	FMV	109,117.	83,426.

FORM 990-PF

STATEMENT 12

		·	
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
SARASOTA ORCHESTRA	NONE SUPPORT	PUBLIC CHARITY	5,000.
AMERICAN JEWISH COMMITTEE	NONE SUPPORT	PUBLIC CHARITY	1,000.
ASOLO RERPERTORY THEATER	NONE SUPPORT	PUBLIC CHARITY	7,000.
COMMUNITY VIDEO ARCHIVES	NONE SUPPORT	PUBLIC CHARITY	1,000.
JEWISH HOUSING COUNCIL	NONE SUPPORT	PUBLIC CHARITY	500.
HERMITAGE ARTISTS RETREAT	NONE SUPPORT	PUBLIC CHARITY	500.
JEWISH FAMILY/CHILDREN'S SERVICES	NONE SUPPORT	PUBLIC CHARITY	1,000.
KEY CHORALE	NONE SUPPORT	PUBLIC CHARITY	1,000.

GRANTS AND CONTRIBUTIONS

PAID DURING THE YEAR

NORMAN E PETERSON & DIANA LAGER	PETERSON		59-2749952
LIGHTHOUSE OF SARASOTA	NONE SUPPORT	PUBLIC CHARITY	250.
MAYOR'S FEED THE HUNGRY	NONE SUPPORT	PUBLIC CHARITY	250.
NEW COLLEGE FOUNDATION	NONE SUPPORT	PUBLIC CHARITY	1,500.
PLANNED PARENTHOOD	NONE SUPPORT	PUBLIC CHARITY	6,500.
RINGLING COLLEGE OF ART & DESIGN	NONE SUPPORT	PUBLIC CHARITY	4,000.
JOHN & MABLE RINGLING MUSEUM FOUNDATION	NONE SUPPORT	PUBLIC CHARITY	1,000.
SARASOTA COUNTY ARTS COUNCIL	NONE SUPPORT	PUBLIC CHARITY	500.
SARASOTA MANATEE JEWISH FEDERATION	NONE SUPPORT	PUBLIC CHARITY	5,100.
SALVATION ARMY	NONE SUPPORT	PUBLIC CHARITY	250.
SARASOTA OPERA	NONE SUPPORT	PUBLIC CHARITY	5,500.

 NORMAN E PETERSON & DIANA LAG	ER PETERSON		59-2749952
WOMEN'S RESOURCE CENTER	NONE SUPPORT	PUBLIC CHARITY	400.
SARASOTA MEMORIAL HEALTHCARE FOUNDATION	NONE SUPPORT	PUBLIC CHARITY	500.
YMCA	NONE SUPPORT	PUBLIC CHARITY	5,000.
SARASOTA SEASON OF SCULPTURE	NONE SUPPORT	PUBLIC CHARITY	500.
SELBY GARDENS	NONE SUPPORT	PUBLIC CHARITY	250.
SELBY PUBLIC LIBRARY	NONE SUPPORT	PUBLIC CHARITY	500.
TEMPLE BETH SHOLOM	NONE SUPPORT	PUBLIC CHARITY	1,000.
VAN WEZEL FOUNDATION	NONE SUPPORT	PUBLIC CHARITY	1,000.
THE WELLNESS COMMUNITY	NONE SUPPORT	PUBLIC CHARITY	250.
TOTAL TO FORM 990-PF, PART XV,	LINE 3A		51,250.

Page 6 of 17

Recipient's Name and Address
PETERSON-LAGER EDUCATIONAL
2921 HEATHER ROW
SARASOTA, FL 34235-2323

NORTHERN TRUST, NA P.O. BOX 803878 CHICAGO, IL 60680

2009 Proceeds from Broker and Barter Exchange Transactions

Federal Income Tax Withheld	0.00	0.00	000	0.00	000	00.0	00.0	0.00	0.00	00.0	0.00	, 00.0	00 0	00 0	0000
Net Gain or Loss	-2,871.01	-3,824.02	2,044.47	-4,650.56	-2,999 07	2.91.	-2,886.08	2.91	2.91	938.07	3.06	1,699.62	4,037.72	-589.64	3.38
Costor Costor other Basis	5,232,75	00.36.00	25,030 76	36,899.51	5,794 00		9,618.00			2,686.34	:	3,315.25	00'996'9	5,941.50	:
Stocks: Bonds, etc.	2,361.74	2,811.98	27,075.23	32,248.95	2,794.93	2.91	6,731.92	2.91	2.91	3,624.41	3.06	5,014.87	11,003.72	5,351.86	3.38
Date of Sale	01/30/2009	01/30/2009	09/01/2009		04/28/2009	05/31/2009	06/01/2009	06/30/5008	07/31/2009	08/31/2009	08/31/2009	09/16/2009	.09/16/2009	09/16/2009	09/30/2009
migms. Date Acquired	08/22/2008	08/22/2008	VARIOUS		10/24/2007	:	08/03/2006			08/31/2004		02/03/2004	08/03/5006	09/21/2007 09/16/2009	
Sales are listed at Gross Proceeds less commissions and option premiums Number of shares. CUSIP Description	CATERPILLAR INC	RESEARCH IN MOTION LTD	MFO VANGUARD FXD INC SECS FD INC INFLATION-PROTECTED SECS FD #119		AFLAC INC	MEC SPDR GOLD TR GOLD SHS	MICROCHIP TECHNOLOGY INC	MFC SPDR GOLD TR GOLD SHS	MFC SPDR GOLD TR GOLD SHS	COLGATE PALMOLIVE CO	MFC SPDR GOLD TR GOLD SHS	:	MCDONALDS CORP	ACCENTURE PLC SHS CL A NEW	MEC SPDR GOLD TR GOLD SHS
Sales are listed at Gross Proc	Short Term Sales 75,0000 149123101 CATERPILLAR INC	50 0000 760975102	2199.4500 922031869	Total Short Term Sales	Long Term 15% Sales 100.0000 001055102	100.0000 78463V107	300.0000 595017104	100.0000 78463V107	100 0000 78463V107	50.0000 194162103	100.0000 78463V107	100.0000 30161N101	200.0000 580135101	150.0000 G1151C101	100.0000 78463V107





TEP116471 1 11 11 of 24

Recipient's Name and Address
PETERSON-LAGER EDUCATIONAL
2921 HEATHER ROW
SARASOTA, FL 34235-2323

NORTHERN TRUST, NA P.O. BOX 803878 CHICAGO, IL 60680

				• •	•	•
Federal Come Tax	00.0	0.00	0.00	00 0	0.00	0.00
Net Gáin or Loss	3 23	-710.05	-264 14	3 46	3.49	-748.22
Cost or other Basis		2,501.00	5,748.00		: : : : : : : : : : : : : : : : : : : :	42,570.09
Stocks Bonds, etc.	3 23	1,790.95	5,483 86	3.46	3.49	41,821.87
Date of Sale	10/31/2009	08/2006 11/13/2009	11/13/2009	11/30/2009	12/31/2009	
Date		03/08/2006	02/11/2004			
Numbër of shares (CUSIP	MFC SPDR GOLD TR GOLD SHS	MFC ISHARES TR DOW JONES US	WELLS FARGO & CO NEW	MFC SPDR GOLD TR GOLD SHS	100.0000 78463V107 MFC SPDR GOLD TR GOLD SHS	
Number of shares	100.0000 78463V107	100,0000 464287713	200.0000 949746101	100.0000 78463V107	100.0000 78463V107	Total Long Term 15% Sales

Form '8868

(Rev April 2009)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No. 1545-1709

Form 8868 (Rev 4-2009)

•	rou are filing for an Automatic 3-Month Extension, complete only Part I and check this box	▶ [X]
	you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this	•
Do n	ot complete Part II unless you have already been granted an automatic 3-month extension on a previously fi	ıled Form 8868.
pai	Automatic 3-Month Extension of Time. Only submit original (no copies needed).	
A cor	poration required to file Form 990-T and requesting an automatic 6-month extension - check this box and con	nplete
	only	▶ □
All of	her corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request a	n extension of time
	Income tax returns	
noted (not a you n	tronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electron automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or composite or composite the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic file.	ically if (1) you want the additional onsolidated Form 990-T. Instead,
Туре	or Name of Exempt Organization	Employer identification numbe
print	NORMAN E PETERSON & DIANA LAGER PETERSON	
.	EDUCATIONAL FUND INC	59-2749952
File by due da filing y	our 2921 HEATHER BOW	
retum Instruc		
Chec	ck type of return to be filed (file a separate application for each return)	
	Form 990 Form 990-T (corporation) Form 4	720
\vdash	Form 990·BL Form 990-T (sec. 401(a) or 408(a) trust) Form 5	
\equiv	Form 990-EZ Form 990-T (trust other than above) Form 6	 ·
	LOUIT 330-EZ	
$\overline{\mathbf{x}}$	Form 990-PE Form 1041-A	
X	Form 990-PF	
X	Form 990-PF	
	DIANA LAGER	870
• Th	DIANA LAGER ne books are in the care of 2921 HEATHER BOW - SARASOTA, FL 34235-7	870
• Th	DIANA LAGER ne books are in the care of 2921 HEATHER BOW - SARASOTA, FL 34235-7 elephone No. (941) 379-7806 FAX No. **Page 1.5 ** FAX No. ** **Page 2.5 ** FAX No.	870
• Th	DIANA LAGER ne books are in the care of > 2921 HEATHER BOW - SARASOTA, FL 34235-7 elephone No. > (941) 379-7806 FAX No. > the organization does not have an office or place of business in the United States, check this box	7202
• Th	DIANA LAGER ne books are in the care of ▶ 2921 HEATHER BOW - SARASOTA, FL 34235-7 elephone No. ▶ (941) 379-7806 FAX No. ▶ the organization does not have an office or place of business in the United States, check this box this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If the	7202 Inis is for the whole group, check the
• Th	DIANA LAGER ne books are in the care of 2921 HEATHER BOW - SARASOTA, FL 34235-7 elephone No. (941) 379-7806 FAX No. the organization does not have an office or place of business in the United States, check this box this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)	7202 Inis is for the whole group, check the
• Th	DIANA LAGER ne books are in the care of ▶ 2921 HEATHER BOW − SARASOTA, FL 34235−7 elephone No. ▶ (941) 379−7806 FAX No. ▶ the organization does not have an office or place of business in the United States, check this box this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If it If it is for part of the group, check this box ▶ and attach a list with the names and EINs of all request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time united to the properties of the properties	7202 This is for the whole group, check the I members the extension will cover
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For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8	868 (Rev. 4-2009)			Page 2
— ■ Ifyo	ou are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this be	ox		▶ X
	Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed		868.	
• If yo	ou are filing for an Automatic 3-Month Extension, complete only Part I (on page 1).			
	Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no c	oples ne	eded).	
Type (print	Name of Exempt Organization NORMAN E PETERSON & DIANA LAGER PETERSON EDUCATIONAL FUND INC		er ident	ification number
File by t extende due dat	Number, street, and room or suite no. If a P.O. box, see instructions.	3	S use only	
filing the return. S Instructi	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SARASOTA, FL 34253-7202			
	type of return to be filed (File a separate application for each return): Form 990		m 5227 m 6069	Form 8870
STOP	! Do not complete Part II if you were not already granted an automatic 3-month extension on a previou	ısly file	form 88	68.
Tel If to box	DIANA LAGER be books are in the care of ≥ 2921 HEATHER BOW - SARASOTA, FL 34235-7 be behone No. ≥ (941) 379-7806 be corganization does not have an office or place of business in the United States, check this box his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) if it is for part of the group, check this box ≥ and attach a list with the names and EINs of all request an additional 3-month extension of time until NOVEMBER 15, 2010. For calendar year 2009, or other tax year beginning, and ending	is is for	the whole	- •
	If this tax year is for less than 12 months, check reason: Initial return Final return		Change in	accounting period
	State in detail why you need the extension THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCUING YET AVAILABLE.	RATE	RETUI	RN IS
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c	Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit	. 8c		0.
	with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions Signature and Verification	. 00	Ψ	
Under it is tr.	penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the correct, and complete, and that I am authorized to prepare this form.	e best of	my knowle	dge and belief,
Signat	ure ▶ SA Title ▶ GA	Date		7/10
			Form	n 8868 (Rev. 4-2009