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**Return of Private Foundation**  
**or Section 4947(a)(1) Nonexempt Charitable Trust**  
**Treated as a Private Foundation****2009**

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 **OCT 1, 2009**, and ending **SEP 30, 2010**G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>THE RICHARD PETRITZ FOUNDATION</b>		A Employer identification number <b>84-1523842</b>
	Number and street (or P.O. box number if mail is not delivered to street address) <b>PMB 342, 445C E. CHEYENNE MTN. BLVD</b>	Room/suite	B Telephone number <b>719-576-4622</b>
	City or town, state, and ZIP code <b>COLORADO SPRINGS, CO 80906</b>		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ <b>1,844,380.</b> (Part I, column (d) must be on cash basis.)		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	41,374.	41,374.	41,374.	STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	148,865.			
	b Gross sales price for all assets on line 6a	730,073.			
	7 Capital gain net income (from Part IV, line 2)		148,865.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	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	190,239.	190,239.	41,374.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	2,240.	2,240.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	2,250.	2,250.	0.	0.
	c Other professional fees	34,175.	34,175.	0.	0.
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	1,310.	1,310.	0.	0.
	22 Printing and publications				
	23 Other expenses	632.	632.	0.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23	40,607.	40,607.	0.	0.
	25 Contributions, gifts, grants paid	6,700.			6,700.
26 Total expenses and disbursements. Add lines 24 and 25	47,307.	40,607.	0.	6,700.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	142,932.				
b Net investment income (if negative, enter -0-)		149,632.			
c Adjusted net income (if negative, enter -0-)			41,374.		

<b>Part II Balance Sheets</b> 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	231,790.	147,636.	147,636.
	2 Savings and temporary cash investments			
	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			
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 5	1,454,962.	1,696,798.	1,696,744.
	14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	15 Other assets (describe ▶ )			
	16 Total assets (to be completed by all filers)	1,686,752.	1,844,434.	1,844,380.
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ )			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	1,686,752.	1,844,434.	
	30 Total net assets or fund balances	1,686,752.	1,844,434.	
	31 Total liabilities and net assets/fund balances	1,686,752.	1,844,434.	

**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	1,686,752.
2 Enter amount from Part I, line 27a	2	142,932.
3 Other increases not included in line 2 (itemize) ▶ OTHER ACCOUNT TRANSFERS	3	14,750.
4 Add lines 1, 2, and 3	4	1,844,434.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,844,434.

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHED CAPITAL GAIN/LOSS SUMMARY		P	10/23/09	04/22/10
b SEE ATTACHED CAPITAL GAIN/LOSS SUMMARY		P	VARIOUS	VARIOUS
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 10,157.		9,643.	514.
b 719,916.		571,565.	148,351.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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	
a			514.
b			148,351.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	148,865.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		3	514.

**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	110,359.	1,508,179.	.073174
2007	108,859.	2,196,293.	.049565
2006	112,969.	2,359,241.	.047884
2005	104,594.	2,141,641.	.048838
2004	75,887.	1,985,689.	.038217

2 Total of line 1, column (d)	2	.257678
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.051536
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,727,332.
5 Multiply line 4 by line 3	5	89,020.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,496.
7 Add lines 5 and 6	7	90,516.
8 Enter qualifying distributions from Part XII, line 4 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	8	6,700.

**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)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	2,993.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,993.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,993.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	2,400.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	2,400.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	2.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed. SEE STATEMENT 6	9	595.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be credited to 2010 estimated tax. Refunded	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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.	1b	X
c Did the foundation file Form 1120-POL for this year?	1c	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.	2	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	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	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?	6	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.	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) CO		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
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	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► THE RICHARD PETRITZ FOUNDATION Telephone no ► 719-576-4622 Located at ► PMB 342, 445C E. CHEYENNE MTN BLVD, COLORADO SPRING ZIP+4 ► 80906			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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

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?

If "Yes" to 6b, file Form 8870.

6b

X

**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
PAMELA PETRITZ COOPER 370 HIDDEN CREEK DRIVE COLORADO SPRINGS, CO 80906	PRESIDENT  20.00	2,240.	0.	0.

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

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

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

0

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**Part 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>	1,528,934.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	224,703.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	1,753,637.
<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>	1,753,637.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	26,305.
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,727,332.
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	86,367.

**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>	86,367.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	2,993.
<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>	2,993.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	83,374.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	83,374.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	83,374.

**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>	6,700.
<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>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	6,700.
<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>	0.
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	6,700.

**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.

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**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				83,374.
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				35,024.
f Total of lines 3a through e	35,024.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$	6,700.			
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				6,700.
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))	35,024.			35,024.
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				41,650.
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				

<b>Part XIV</b>	<b>Private Operating Foundations</b> (see instructions and Part VII-A, question 9)
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N/A

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section
- ☐
- 4942(j)(3) or
- ☐
- 4942(j)(5)

**Part XV** Supplementary Information (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year CSTI TECH INCUBATOR COLORADO SPRINGS, CO	NONE	TAX EXEMPT	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	5,000.
DANA FARBER JIMMY FUND COLORADO SPRINGS, CO	NONE	TAX EXEMPT	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	200.
HOPE & HOME COLORADO SPRINGS, CO	NONE	TAX EXEMPT	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	500.
PEAK VENTURE GROUP COLORADO SPRINGS, CO	NONE	TAX EXEMPT	TO FURTHER THE ORGANIZATION'S EXEMPT PURPOSE	1,000.
<b>Total</b>			<b>3a</b>	<b>6,700.</b>
<b>b</b> Approved for future payment  NONE				
<b>Total</b>			<b>3b</b>	<b>0.</b>



**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

- |   |  | Yes   | No |
|---|--|-------|----|
| 1 | 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?  |       |    |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of  |       |    |
|   | (1) Cash   | 1a(1) | X  |
|   | (2) Other assets   | 1a(2) | X  |
| 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  |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | 1c    | X  |
| d | 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	Signature of officer or trustee <i>Pamela Petritz Cooper</i>		Date <i>5-12-11</i>	Title <i>President</i>	
	Paid Preparer's Use Only	Preparer's signature <i>[Signature]</i>	Date <i>5/11/11</i>	Check if self-employed <input type="checkbox"/>	Preparer's identifying number <i>P00641511</i>
Firm's name (or yours if self-employed), address, and ZIP code <i>STOCKMAN KAST RYAN &amp; CO, LLP 102 N. CASCADE AVENUE, SUITE 400 COLORADO SPRINGS, CO 80903</i>				EIN <i>84-1509584</i>  Phone no. <i>719-630-1186</i>	

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FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
TD AMERITRADE ACCOUNT	41,374.	0.	41,374.
TOTAL TO FM 990-PF, PART I, LN 4	41,374.	0.	41,374.

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	2,250.	2,250.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	2,250.	2,250.	0.	0.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATION FEES	14,522.	14,522.	0.	0.
INVESTMENT MANAGEMENT FEES	19,653.	19,653.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	34,175.	34,175.	0.	0.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	258.	258.	0.	0.
RESEARCH EXPENSE	180.	180.	0.	0.
MISCELLANEOUS EXPENSE	194.	194.	0.	0.
TO FORM 990-PF, PG 1, LN 23	632.	632.	0.	0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	5
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
TD AMERITRADE - SEE ATTACHED	FMV	1,696,798.	1,696,744.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,696,798.	1,696,744.

FORM 990-PF	INTEREST AND PENALTIES	STATEMENT	6
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TAX DUE FROM FORM 990-PF, PART VI	593.
	2.
	5.
	12.
TOTAL AMOUNT DUE	612.

FORM 990-PF	LATE PAYMENT PENALTY	STATEMENT	7
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DESCRIPTION	DATE	AMOUNT	BALANCE	MONTHS	PENALTY
TAX DUE	02/15/11	2,993.	2,993.		
EXTENSION PAYMENT	02/15/11	-2,400.	593.	4	12.
DATE FILED	05/16/11		593.		
TOTAL LATE PAYMENT PENALTY					12.

FORM 990-PF	LATE PAYMENT INTEREST	STATEMENT	8
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DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	02/15/11	2,993.	2,993.	.0300		
EXTENSION PAYMENT	02/15/11	-2,400.	593.	.0300	44	2.
INTEREST RATE CHANGE	03/31/11	0.	595.	.0400	46	3.
DATE FILED	05/16/11		598.			
TOTAL LATE PAYMENT INTEREST						5.



The Richard Petritz Foundation  
Portfolio Value and Cost Basis - As of 9/30/2010

TD Ameritrade Statement		
Security	9/30/2010 Cost Basis	9/30/2010 Balance
<b>BONDS</b>		
02635PRT2 AM GEN FIN 5 375	48,121.00	47,312.50
02635PTB9 AM GEN FIN 4 875	17,195.00	18,900.00
02635PTD5 AM GEN FIN 5 855	17,251.20	18,450.00
026874AX5 AM INTL GRP 5 05	17,308.20	20,350.00
060505CS1 BNK OF AM SR NOT 5 625	33,371.80	37,782.50
36968R2E5 GE CAP CORP 4 75	50,000.00	52,006.50
45974VB31 INTL LEASE FIN CORP 5 30	45,153.00	50,125.00
48327WAC8 KEYBNK NATL ASSN 5 50	48,188.50	53,227.50
55283ECJ2 MBNA CORP 5 0	27,990.00	31,790.70
59018YJ36 ML 6 05	49,303.00	53,665.50
61748AAE6 MORGN STNLY GLBL 4 75	15,919.82	18,798.66
802813AD7 SANTANDR SB NT 7.25	25,544.00	27,897.50
92976GAD3 WACHOVIA BANK 4 875	16,968.20	21,662.00
<b>TOTAL BONDS</b>	<b>410,311.82</b>	<b>451,968.36</b>
<b>MUTUAL FUNDS</b>		
**DODGE & COX FUNDS INTERNATIONAL STOCK FUND	45,075.00	39,060.55
**MATTHEWS INDIA FUND	15,000.00	24,093.61
**MATTHEWS PACIFIC TIGER FUND	50,000.00	55,995.13
**VANGUARD INTERNATIONAL VALUEPORTFOLIO	45,075.00	35,650.56
ARTISAN INTERNATIONAL FUND	9,200.00	9,401.09
FAIRHOLME FD COM	37,009.99	33,924.42
HARBOR INTERNATIONAL GROWTH FUND	58,993.84	63,132.95
HARRIS ASSOC INVT TR — OAKMARK FD I (OAKMX)	57,000.00	52,827.24
MANNING & NAPIER FD INC NEW WORLD OPPTY	45,000.00	44,410.01
MATTHEWS INTL FDS ASIAN GW&INC INV	38,000.00	40,463.38
PRIMECAP ODYSSEY FUNDS GROWTH FUND	58,009.99	54,533.25
PROFESSIONALLY MANAGED PTFL OSTERWEIS FD	60,009.99	58,774.09
RESERVE SHORT TERM INVT TR RESV YLD PLS	17.80	17.29
ROWE T PRICE EQUITY INCOME F SH BEN INT	8,009.99	5,464.87
ROWE T PRICE NEW AM GROWTH F SH BEN INT	28,509.99	26,937.59
VANGUARD BD INDEX FD INC SHORT TRM PTFL	85,009.99	88,948.43
VANGUARD EXPLORER FD INC COM	13,009.99	12,363.64
VANGUARD INDEX FDS SML CP GRW INV (MSGX)	8,509.99	8,001.50
VANGUARD SPLZD DIVIDEND GRTH	75,009.99	72,804.00
VANGUARD WHITEHALL FDS INC INTL EXPL INV	25,009.99	25,742.75
<b>TOTAL MUTUAL FUNDS</b>	<b>760,461.54</b>	<b>750,546.45</b>
<b>STOCKS</b>		
AMEDISYS INC	3,168.72	3,094.00
ANADARKO PETROLEUM CORP	4,729.27	10,383.10
AUTODESK INC	3,513.05	6,489.91
CASCADE CORP COM	34,742.01	18,082.40
CENTURYTEL INC COM / CENTURYLINK, INC (CTL)	7,156.77	8,404.98
CHEVRONTXACO CORP	5,135.90	13,049.05
COLONIAL PROPERTIES TRUST	6,243.12	2,978.96
COMPUTER SCIENCES CORP	1,741.30	1,840.00
DELPHI FINANCIAL GROUP INC CL A	2,844.60	2,748.90
DEVELOPERS DIVERSIFIED REALTY CORP	3,840.78	1,795.20
ENERGIZER HOLDINGS INC	3,659.47	5,580.09
INDIA FUND INC	25,048.91	19,385.21
ISHARES TR MSCI EAFE IDX	19,543.49	19,222.00
ISHARES TR RUSSELL 2000	62,476.49	57,375.00
ISHARES TR RUSSELL MIDCAP	64,913.74	61,903.45
JP MORGAN CHASE & CO COM	1,389.76	1,217.82
MOOG INC-CL A	6,727.83	6,285.27
MOTOROLA INC	4,004.59	1,919.25
MYLAN LABORATORIES INC	36,164.75	34,140.15
NATIONWIDE HEALTH PROPERTIES INC	2,528.95	7,153.95
OLD REPUBLIC INTL CORP	2,697.07	1,911.30
ROYAL DUTCH SHELL PLC SPONSORED ADR REPSTG B SHS	8,567.97	11,816.78
STANDARD & POORS DEPOSITARY RECEIPTS (SPDRS) (BOOK ENT)	204,828.13	184,319.95
USEC INC	2,022.12	1,915.11
WESTAR ENERGY INC	4,860.00	5,815.20
WESTERN DIGITAL CORP	3,676.03	5,422.49
<b>TOTAL STOCKS</b>	<b>526,024.83</b>	<b>494,229.63</b>
<b>MONEY MARKET</b>		
-Cash-	147,600.19	147,600.19
<b>TOTAL Investments</b>	<b>1,844,434.05</b>	<b>1,844,380.30</b>

THE RICHARD PETRITZ FOUNDATION									
CAPITAL GAINS - 2010 TAX YEAR									
Account	Security	Shares	Purchase	Sold	Gross Proceeds	Cost Basis	Realized Gain/Loss		
10/1/2009 through 09/30/2010									
SHORT TERM									
Foundation - TD	CENTURYTEL INC COM	287	10/23/2008	4/22/2010	10,156.78	9,843.17	513.62		
TOTAL SHORT TERM					10,156.78	9,843.17	513.62		
LONG TERM									
Foundation - TD	INDYMAC BANCORP INC	500	2/12/2004	12/21/2008	7.5	16,357.00	-16,359.50		
Foundation - TD	BAXTER INTL INC COM	588	11/5/2007	12/21/2009	32,802.52	33,453.88	-651.36		
Foundation - TD	CUMMINS INC	1,720.00	12/28/2004	12/21/2008	81,464.31	36,121.35	45,342.96		
Foundation - TD	SANDERSON FARMS INC COM	138	11/5/2007	3/29/2010	7,745.75	4,825.75	3,120.00		
Foundation - TD	SANDERSON FARMS INC COM	800	11/5/2007	3/29/2010	44,902.81	26,825.98	18,076.82		
Foundation - TD	METHODE ELECTRS INC COM	700	11/5/2007	3/29/2010	7,109.52	8,948.98	-1,839.47		
Foundation - TD	METHODE ELECTRS INC COM	527	11/5/2007	3/29/2010	5,352.45	6,745.60	-1,393.15		
Foundation - TD	METHODE ELECTRS INC COM	1,400.00	11/5/2007	3/29/2010	14,218.04	17,982.00	-3,763.96		
Foundation - TD	METHODE ELECTRS INC COM	100	11/5/2007	3/29/2010	1,015.65	1,282.00	-266.35		
Foundation - TD	METHODE ELECTRS INC COM	200	11/5/2007	3/29/2010	2,031.28	2,570.00	-538.71		
Foundation - TD	AMEDISYS INC	191	3/10/2008	4/22/2010	11,264.54	4,658.71	6,605.83		
Foundation - TD	AMEDISYS INC	1,052.00	3/10/2008	4/22/2010	62,077.58	25,848.46	36,229.12		
Foundation - TD	COLONIAL PROPERTIES TRUST	250	4/28/2003	4/22/2010	3,687.47	8,482.50	-4,795.03		
Foundation - TD	COLONIAL PROPERTIES TRUST	586	4/28/2003	4/22/2010	8,355.33	19,204.38	-10,849.05		
Foundation - TD	COMPUTER SCIENCES CORP	330	2/12/2004	4/22/2010	18,060.53	14,385.70	3,674.83		
Foundation - TD	CHEVRONTXACO CORP	509	4/28/2003	4/22/2010	41,203.09	16,237.10	24,965.99		
Foundation - TD	CHEVRONTXACO CORP	100	4/28/2003	4/22/2010	8,098.81	3,190.00	4,908.81		
Foundation - TD	DEVELOPERS DIVERSIFIED REALTY CORP	708	4/28/2003	4/22/2010	8,924.88	16,110.48	-7,185.60		
Foundation - TD	DELPHI FINANCIAL GROUP INC CL A	100	2/12/2004	4/22/2010	2,666.96	2,582.00	84.96		
Foundation - TD	ENERGIZER HOLDINGS INC	317	2/12/2004	4/22/2010	19,133.31	13,976.53	5,156.78		
Foundation - TD	MOOG INC-CL A	100	3/9/2007	4/22/2010	3,764.94	3,801.04	-36.10		
Foundation - TD	MOOG INC-CL A	682	3/9/2007	4/22/2010	25,745.13	25,923.08	-177.95		
Foundation - TD	OLD REPUBLIC INTL CORP	812	2/12/2004	4/22/2010	8,484.48	11,960.93	-3,476.45		
Foundation - TD	NATIONWIDE HEALTH PROPERTIES INC	815	4/28/2003	4/22/2010	28,022.92	11,141.05	16,881.87		
Foundation - TD	ROYAL DUTCH SHELL PLC SPONSORED ADR REPT	316	4/28/2003	4/22/2010	18,410.33	13,470.03	4,940.30		
Foundation - TD	USEC INC	299	4/28/2003	4/22/2010	1,730.16	1,638.52	91.64		
Foundation - TD	USEC INC	1,332.00	4/28/2003	4/22/2010	7,752.23	7,289.36	462.87		
Foundation - TD	WESTAR DIGITAL CORP	1,409.00	3/10/2006	4/22/2010	55,348.82	27,117.92	28,230.90		
Foundation - TD	WESTAR ENERGY INC	250	12/23/2003	4/22/2010	5,902.57	5,255.00	637.57		
Foundation - TD	MOTOROLA INC	1,375.00	8/4/2004	4/22/2010	9,724.84	24,482.11	-14,757.27		
Foundation - TD	ANADARKO PETROLEUM CORP	218	2/12/2004	4/22/2010	15,641.23	5,684.73	9,956.50		
Foundation - TD	ANADARKO PETROLEUM CORP	100	2/12/2004	4/22/2010	7,179.87	2,598.50	4,581.37		
Foundation - TD	DELPHI FINANCIAL GROUP INC CL A	390	2/12/2004	4/22/2010	10,440.16	10,089.80	370.36		
Foundation - TD	ANADARKO PETROLEUM CORP	100	2/12/2004	4/22/2010	7,170.88	2,598.50	4,572.38		
Foundation - TD	CENTURYTEL INC COM	300	11/5/2007	4/22/2010	10,608.83	13,849.70	-3,240.87		
Foundation - TD	CENTURYTEL INC COM	100	11/5/2007	4/22/2010	3,538.95	4,559.98	-1,021.04		
Foundation - TD	CENTURYTEL INC COM	494	11/5/2007	4/22/2010	16,420.73	21,111.54	-4,690.81		
Foundation - TD	STANDARD & POORS DEPOSITORY RECEIPTS (SPDR)	520	9/18/2007	4/22/2010	62,014.61	77,420.35	-15,405.75		
Foundation - TD	AUTODESK INC	1,018.00	5/28/2004	4/22/2010	32,873.10	17,606.31	15,266.79		
Foundation - TD	AUTODESK INC	278	5/28/2004	4/22/2010	9,008.43	4,828.27	4,180.16		
Foundation - TD	RESERVE SHORT TERM INVT TR RESV YLD PLS	2.07	12/17/2007	5/7/2010	2.27	2.27	0.00		
TOTAL LONG TERM					719,918.02	571,565.24	148,352.78		
OVERALL TOTAL					730,072.81	581,208.41	148,864.40		