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

2010

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2010, or tax year beginning Jul 1, 2010, and ending Jun 30, 2011

G Check all that apply. ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

Name of foundation

Robert &amp; Joyce Oberkotter Family Foundation

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

P.O. Box 45

City or town

Newport

State ZIP code

NH 03773

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

\$ 9,601,445.

J Accounting method ☐ Cash ☐ Accrual  
☒ Other (specify) Modified Cash

(Part I, column (d) must be on cash basis)

A Employer identification number

82-0577634

B Telephone number (see the instructions)

(603) 543-0073

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

## 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) (see the instructions))

(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 (att sch)

410.

2 Ck ☒ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

171,047.

171,046.

171,046.

5a Gross rents  
b Net rental income or (loss)

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

303,494.

b Gross sales price for all assets on line 6a

1,930,175.

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

303,494.

8 Net short-term capital gain

22,047.

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit/(loss) (att sch)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

474,951.

474,540.

193,093.

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) L-16a Stmt

22,161.

22,161.

22,161.

b Accounting fees (attach sch) L-16b Stmt

2,500.

2,500.

2,500.

c Other prof fees (attach sch)

17 Interest

18 Taxes (attach schedule)(see instr) 990 PF

12,269.

12,269.

12,269.

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

See Line 23 Stmt 1-7-2011

1,374.

1,374.

1,374.

24 Total operating and administrative expenses. Add lines 13 through 23

38,304.

38,304.

38,304.

25 Contributions, gifts, grants, etc.

357,000.

357,000.

357,000.

26 Total expenses and disbursements. Add lines 24 and 25

395,304.

38,304.

395,304.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

79,647.

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

474,540.

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

154,789.

G14

24

SCANNED OCT 28 2011

ADMINISTRATIVE EXPENSES

IRS USE

**Part II Balance Sheets**

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>ASSETS</b>	1 Cash — non-interest-bearing			
	2 Savings and temporary cash investments	241,060.	780,064.	780,064.
	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 (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	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 (attach schedule)			
	b Investments — corporate stock (attach schedule) L-10b Stmt..	7,972,816.	8,821,381.	8,821,381.
	c Investments — corporate bonds (attach schedule)			
	11 Investments — land, buildings, and equipment basis			
Less: accumulated depreciation (attach schedule)				
12 Investments — mortgage loans				
13 Investments — other (attach schedule)				
14 Land, buildings, and equipment basis				
Less: accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 <b>Total assets</b> (to be completed by all filers — see instructions. Also, see page 1, item i)	8,213,876.	9,601,445.	9,601,445.	
<b>LIABILITIES</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 <b>Total liabilities</b> (add lines 17 through 22)			
<b>FUND ASSETS</b>	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	7,512,023.	8,213,876.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	701,853.	1,387,569.	
	30 <b>Total net assets or fund balances</b> (see the instructions)	8,213,876.	9,601,445.	
	31 <b>Total liabilities and net assets/fund balances</b> (see the instructions)	8,213,876.	9,601,445.	

**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	8,213,876.
2 Enter amount from Part I, line 27a	2	79,647.
3 Other increases not included in line 2 (itemize) <u>See Other Increases Stmt</u>	3	1,307,922.
4 Add lines 1, 2, and 3	4	9,601,445.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	9,601,445.

**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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
<b>1a Publicly Traded Stock</b>		P	07/01/10	12/31/10
b				
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 1,930,175.		1,626,681.	303,494.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			303,494.
b			
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	303,494.
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) (see the instructions) If (loss), enter -0- in Part I, line 8 ]		3	22,047.

**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 the 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 (column (b) divided by column (c))
2009	289,409.	8,341,118.	0.034697
2008	175,275.	7,399,343.	0.023688
2007	127,059.	1,880,765.	0.067557
2006	97,289.	1,934,999.	0.050279
2005	71,725.	1,972,856.	0.036356

2 Total of line 1, column (d)	2	0.212577
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	0.042515
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	9,348,777.
5 Multiply line 4 by line 3	5	397,463.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,745.
7 Add lines 5 and 6	7	402,208.
8 Enter qualifying distributions from Part XII, line 4	8	395,304.

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

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

1 a 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 instr.)		
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 9,491.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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 9,491.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4 0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		5 9,491.
6 Credits/Payments		
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a 8,400.	
b Exempt foreign organizations – tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d	7 8,400.	
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9 1,091.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 0.	
11 Enter the amount of line 10 to be <b>Credited to 2011 estimated tax</b>	0. <b>Refunded</b>	11

**Part VIII Statements Regarding Activities**

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		X
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		
c Did the foundation file <b>Form 1120-POL</b> for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) <b>NH – New Hampshire</b>		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	X	

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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 <u>N/A</u>	13	X	
14	The books are in care of <u>Benjamin Chapman CPA</u> Telephone no <u>(603) 543-0073</u> Located at <u>97 Pleasant Street, Claremont, NH</u> ZIP + 4 <u>03743</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country <u></u>	16	Yes	No
				X

**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
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? <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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1 b	
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 2010?	1 c	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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>		
b Are there any years listed in 2a for which the foundation is <b>not</b> 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 the instructions.)	2 b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <u>20__ , 20__ , 20__ , 20__</u>		
3 a 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 2010 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 2010)	3 b	
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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 2010?	4 b	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)? (see instructions)

☐ 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)?

5b

Organizations relying on a current notice regarding disaster assistance check here

☐

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

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

If 'Yes' to 6b, file Form 8870

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

☐ Yes ☒ No

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

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 (see instructions).**

(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
Anu Mullikin C/O Devine Millimet & Branch, PA PO Box 719 Manchester NH 03105	Secretary 1.00	0.	0.	0.
Robert McDevitt 267 Gilman Pond Road Newport, NH 03773	Treasurer 1.00	0.	0.	0.
Caryl McDevitt 267 Gilman Pond Road, Newport, NH 03773	President 1.00	0.	0.	0.

**2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). 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				
0				
0				
0				
0				

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

None

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		
	None	
Total number of others receiving over \$50,000 for professional services		None

**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 Education Grants (See Attached) Less returns of \$1750	
	357,000.
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 None	
	0.
2 None	
	0.
All other program-related investments See instructions	
3 None	
	0.
Total. Add lines 1 through 3	None

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	8,652,014.
b Average of monthly cash balances	1b	839,130.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	9,491,144.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	9,491,144.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	142,367.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	9,348,777.
6 Minimum investment return. Enter 5% of line 5	6	467,439.

**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.)

1 Minimum investment return from Part X, line 6		1	467,439.
2a Tax on investment income for 2010 from Part VI, line 5	2a	9,491.	
b Income tax for 2010 (This does not include the tax from Part VI)	2b		
c Add lines 2a and 2b	2c	9,491.	
3 Distributable amount before adjustments Subtract line 2c from line 1	3	457,948.	
4 Recoveries of amounts treated as qualifying distributions	4		
5 Add lines 3 and 4	5	457,948.	
6 Deduction from distributable amount (see instructions)	6		
7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	457,948.	

**Part 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	395,304.
b Program-related investments — total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
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	395,304.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	395,304.

**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 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				457,948.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			339,862.	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2010				
a From 2005	0.			
b From 2006	0.			
c From 2007	0.			
d From 2008	0.			
e From 2009	0.			
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: \$ 395,304.				
a Applied to 2009, but not more than line 2a			339,862.	
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2010 distributable amount				55,442.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
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				
d Subtract line 6c from line 6b. Taxable amount – see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount – see instructions			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				402,506.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2006	0.			
b Excess from 2007	0.			
c Excess from 2008	0.			
d Excess from 2009	0.			
e Excess from 2010	0.			

BAA

Form 990-PF (2010)

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
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 Information** (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2) )  
None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest  
None

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

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

a The name, address, and telephone number of the person to whom applications should be addressed  
Robert & Joyce Oberkotter Family Foundation  
P.O. Box 45  
Newport NH 03773 (603) 863-8088

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

c Any submission deadlines  
Mid February See Attached

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors.  
See attached list of eligible schools.

**Part VII** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
See Attached Sheets	None	n/a	College Scholarship	317,000.
See Attached Sheets				
See Attached NH 03743 Town of Unity School, NH Center Road Charlestown NH 03603				
		n/a	School Improvement	40,000.
<b>Total</b>			<b>3a</b>	<b>357,000.</b>
<i>b Approved for future payment</i>				
None		n/a	n/a	0.
None				
None NH 03743				
<b>Total</b>			<b>3b</b>	<b>0.</b>

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

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a None					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate.					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					303,494.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a None	0				
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)					303,494.
13 Total. Add line 12, columns (b), (d), and (e)					303,494.

(See worksheet in line 13 instructions to verify calculations.)

## **Part XVI B Relationship of Activities to the Accomplishment of Exempt Purposes**

[illegible]



Name <b>Robert &amp; Joyce Oberkotter Family Foundation</b>	Employer Identification Number <b>82-0577634</b>
--	---

**Asset Information:**

Description of Property	<u>Publicly Traded Stock</u>		
Date Acquired	<u>various</u>	How Acquired:	_____
Date Sold	<u>various</u>	Name of Buyer:	_____
Sales Price	<u>1,930,175.</u>	Cost or other basis (do not reduce by depreciation)	<u>1,626,681.</u>
Sales Expense:	_____	Valuation Method:	_____
Total Gain (Loss)	<u>303,494.</u>	Accumulation Depreciation	_____

  

Description of Property:	_____		
Date Acquired:	_____	How Acquired:	_____
Date Sold	_____	Name of Buyer:	_____
Sales Price	_____	Cost or other basis (do not reduce by depreciation)	_____
Sales Expense	_____	Valuation Method:	_____
Total Gain (Loss):	_____	Accumulation Depreciation	_____

  

Description of Property	_____		
Date Acquired	_____	How Acquired	_____
Date Sold:	_____	Name of Buyer	_____
Sales Price:	_____	Cost or other basis (do not reduce by depreciation)	_____
Sales Expense	_____	Valuation Method	_____
Total Gain (Loss)	_____	Accumulation Depreciation	_____

  

Description of Property:	_____		
Date Acquired	_____	How Acquired.	_____
Date Sold:	_____	Name of Buyer:	_____
Sales Price:	_____	Cost or other basis (do not reduce by depreciation)	_____
Sales Expense	_____	Valuation Method	_____
Total Gain (Loss)	_____	Accumulation Depreciation	_____

  

Description of Property	_____		
Date Acquired:	_____	How Acquired.	_____
Date Sold:	_____	Name of Buyer:	_____
Sales Price	_____	Cost or other basis (do not reduce by depreciation)	_____
Sales Expense.	_____	Valuation Method:	_____
Total Gain (Loss)	_____	Accumulation Depreciation:	_____

  

Description of Property:	_____		
Date Acquired:	_____	How Acquired.	_____
Date Sold	_____	Name of Buyer:	_____
Sales Price	_____	Cost or other basis (do not reduce by depreciation)	_____
Sales Expense:	_____	Valuation Method.	_____
Total Gain (Loss)	_____	Accumulation Depreciation:	_____

  

Description of Property	_____		
Date Acquired	_____	How Acquired	_____
Date Sold	_____	Name of Buyer:	_____
Sales Price:	_____	Cost or other basis (do not reduce by depreciation)	_____
Sales Expense:	_____	Valuation Method:	_____
Total Gain (Loss)	_____	Accumulation Depreciation:	_____

  

Description of Property:	_____		
Date Acquired:	_____	How Acquired.	_____
Date Sold:	_____	Name of Buyer:	_____
Sales Price:	_____	Cost or other basis (do not reduce by depreciation)	_____
Sales Expense:	_____	Valuation Method	_____
Total Gain (Loss)	_____	Accumulation Depreciation:	_____

Form 990-PF, Page 1, Part I, Line 23

**Line 23 Stmt**

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Office Expense	1,224.		1,224.	1,224.
State Fee	150.		150.	150.
Total	1,374.		1,374.	1,374.

Form 990-PF, Page 2, Part III, Line 3

**Other Increases Stmt**

Adj for Unrealized Gains	1,307,923.
Rounding	-1.
Total	1,307,922.

Form 990-PF, Page 10, Part XV, Line 2

**Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs**

Name Robert & Joyce Oberkotter Family Foundation  
 Address P.O. Box 45  
 City, St, Zip, Phone Newport NH 03773 (000) 000-0000

The form in which applications should be submitted and information and materials they should include.  
See Attached

Any submission deadlines:

See Attached

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

See Attached

Name Robert & Joyce Oberkotter Family Foundation  
 Address P.O. Box 45  
 City, St, Zip, Phone Newport NH 03773 (603) 863-8088

The form in which applications should be submitted and information and materials they should include.  
See attached

Any submission deadlines:

Mid February See Attached

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

See attached list of eligible schools.

Form 990-PF, Page 1, Part I

**Line 16a - Legal Fees**

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Devine Millimet Atto	Legal Maintenance	22,161.		22,161.	22,161.
Total		22,161.		22,161.	22,161.



Form 990-PF, Page 1, Part I

**Line 16b - Accounting Fees**

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Benjamin Chapman	Tax Preparation	2,500.		2,500.	2,500.
Total		<u>2,500.</u>		<u>2,500.</u>	<u>2,500.</u>

Form 990-PF, Page 2, Part II, Line 10b

**L-10b Stmt**

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
Wells Fargo Investment Account	8,821,381.	8,821,381.
Total	<u>8,821,381.</u>	<u>8,821,381.</u>

Reminder Notes and Narratives

Robert & Joyce Oberkotter Family Foundation

82-0577634

Form 990-PF,p10: Part XV, Line 2d-1

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Steven HS  
Windsor HS  
Fall Mountain HS  
Kimball Union Academy  
Mid-Vt Christian School  
The Oliverian School  
Lebanon HS  
Newport HS  
Kearsage HS  
Mount Royal Academy  
Mascoma Valley Regional HS  
Proctor Academy  
The Block Island School

7/10 Chelsea Stowell

None

NH

College Scholarship

Person

\$3500

Recipient Name & Address	individual show any relationship to any foundation manager or	Foundation status of the recipient	Purpose of grant or contribution	Person or Business checkbox and amount
Amanda Robbins 200 Johnson Road Windsor, VT 05086	None	N/A	College Scholarship	Person X Business \$3500 00
Emily Ranauro 238 Wentworth Road Walpole, NH 03608	None	N/A	College Scholarship	Person X Business \$3500 00
Megan Johnson 210 Cheney Road Newport, NH 03773	None	N/A	College Scholarship	Person X Business \$3500.00
Abbie Whiting P.O. Box 1012 91 Bascom Road Newport, NH 03773	None	N/A	College Scholarship	Person X Business \$3500 00
Aaron Crosby 22 Whitcomb Lane Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Nicholas C Marro 20 Nelmar Heights Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Kyle Forrest 10 West Street North Walpole, NH 03609	None	N/A	College Scholarship	Person X Business \$3500 00
Karri Makinen 106 Sand Hill Road Walpole, NH 03608	None	N/A	College Scholarship	Person X Business \$3500 00
Kalin Gregory-Davis P O Box 391 Menden, NH 03770	None	N/A	College Scholarship	Person X Business \$3500 00
Gabrielle C Lombardo 247 North Koski Road Newport, NH 03773	None	N/A	College Scholarship	Person X Business \$3500 00
Eleanor Anne Wilson 2 Chase Road Lebanon, NH 03755	None	N/A	College Scholarship	Person X Business \$3500 00
Rowen Bartlett Goss 698 Daniels Road Pike, NH 03780	None	N/A	College Scholarship	Person X Business \$3500 00
Gabriel Proctor c/o Western State College 600 North Adams Street Gunnison, CO 81231	None	N/A	College Scholarship	Person X Business \$3500 00
Lucas Aaron Wemple P O Box 197 Bridgewater Cms, VT 05035	None	N/A	College Scholarship	Person X Business \$3500 00
Christopher Powers 762 Kearsage Mt Rd Warner, NH 03278	None	N/A	College Scholarship	Person X Business \$3500 00
Garrett Paul Hubert 179 Springfield Road Newport, NH 03773	None	N/A	College Scholarship	Person X Business \$3500.00
Rachel Eaton 74 Church Road Unity, NH 03773	None	N/A	College Scholarship	Person X Business \$3500 00
Kayleigh Kangas 13 Cindy Avenue Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Ian MacKenzie 37 Stone Avenue Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$17500 00

Jessica Powers 220 Pleasant Street Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Kirsten Beaudry 827 Wentworth Road Walpole, NH 03608	None	N/A	College Scholarship	Person X Business \$3500 00
Breanna R Gokey 153 Mica Mine Road Unity, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Enca J Holmes 55 Ball Hill Road Langdon, NH 03602	None	N/A	College Scholarship	Person X Business \$3500 00
Rebecca K Holtz 38 Rust Farm Lane Alstead, NH 03602	None	N/A	College Scholarship	Person X Business \$2000 00
Olivia Lincoln 31 Main Street Alstead, NH 03602	None	N/A	College Scholarship	Person X Business \$3500 00
Kimberley Ann MacDonald 97 South Lincoln Keene, NH 03431	None	N/A	College Scholarship	Person X Business \$3500 00
Cory Smith 14 West Street PO Box 154 Charlestown, NH 03603	None	N/A	College Scholarship	Person X Business \$3500 00
Ian Zimmermann PO Box 178 Walpole, NH 03608	None	N/A	College Scholarship	Person X Business \$3500 00
Kelly Fayton 16 Lake Avenue Newbury, NH 03255	None	N/A	College Scholarship	Person X Business \$3500 00
Alex Keenan PO Box 244 Elkins, NH 03233	None	N/A	College Scholarship	Person X Business \$3500 00
Alexandra Barnicle PO Box 345 Menden, NH 03770	None	N/A	College Scholarship	Person X Business \$3500 00
Matthew E Burns 58A Lyndale Avenue Methuen, MA 01844	None	N/A	College Scholarship	Person X Business \$3500 00
Shapreka D Clarke Millers Drive, Deep Creek Eleuthera, Bahamas	None	N/A	College Scholarship	Person X Business \$3500 00
Tess E Fournier 330 Main Street Amesbury, MA 01913	None	N/A	College Scholarship	Person X Business \$3500 00
Benjamin F. Newton PO Box 72 20 School Street Cornish Flat, NH 03746	None	N/A	College Scholarship	Person X Business \$3500 00
Nichlas A Cannistraci 5 Walnut Hill Ct Springfield, VT 05156	None	N/A	College Scholarship	Person X Business <del>\$3500 00</del> 7000 00
Julia Kepler 44 Camel Hump Road Croydon, NH 03773	None	N/A	College Scholarship	Person X Business \$3500 00
Hannah M Nelson 236 Mountain Road Newbury, NH 03255	None	N/A	College Scholarship	Person X Business \$3500.00
Agnes Schissel 257 Corbin Road Newport, NH 03773	None	N/A	College Scholarship	Person X Business \$3500 00

Sophie Schissel 257 Corbin Road Newport, NH 03773	None	N/A	College Scholarship	Person X Business \$3500 00
Zheyi (Alice) Peng 31 Bower Street So Burlington, VT 05403	None	N/A	College Scholarship	Person X Business \$3500.00
Alexander Bourne 677 East Road Cornish, NH 03745	None	N/A	College Scholarship	Person X Business \$3500 00
Elissa Kate Coburn 10 Tutherly Ave Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Molly White 4 Hemlock Road Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Charles Wesley Cubberley P O Box 65 South Acworth, NH 03607	None	N/A	College Scholarship	Person X Business \$3500.00
Elizabeth Ann Forrest 10 West Street North Walpole, NH 03609	None	N/A	College Scholarship	Person X Business \$3500 00
Eva Hagan 39 Hemlock Road Langdon, NH 03602	None	N/A	College Scholarship	Person X Business \$3500 00
Margaret K Vogel P O Box 55 South Ackworth, NH 03607	None	N/A	College Scholarship	Person X Business \$3500.00
Chelsey Ray Laughinghouse 789 County Road P O Box 273 New London, NH 03257	None	N/A	College Scholarship	Person X Business \$3500 00
Anna Prohl 146 Wilnot Center Road Elkins, NH 03233	None	N/A	College Scholarship	Person X Business \$3500 00
Shelby L. Pillsbury 7 Madison Place Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Alexis J Dupree 35 Storrs Hill Road Lebanon, NH 03766	None	N/A	College Scholarship	Person X Business \$3500.00
Kellee Anne Kosiorek 929 Lockehaven Road Enfield, NH 03748	None	N/A	College Scholarship	Person X Business \$3500 00
Jessica Lynn Ruel P O Box 209 Enfield, NH 03748	None	N/A	College Scholarship	Person X Business \$3500 00
Nicholas Joseph Petersen 231 Tracy Farm Road Windsor, VT 05089	None	N/A	College Scholarship	Person X Business \$3500.00
Amanda Smith 65 McCusker Place Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Kendra Campbell 23 Cheney Street Newport, Nh 03773	None	N/A	College Scholarship	Person X Business \$3500.00
Jesse Adam Shull 192 Summer Street Newport, NH 03773	None	N/A	College Scholarship	Person X Business \$3500 00
Chelsea Dana 1055 Bowen Hill Road Springfield, VT 05156	None	N/A	College Scholarship	Person X Business \$3500 00

Alexander Jacob Drost 616 Brook Road West Windsor, VT 05089	None	N/A	College Scholarship	Person X Business \$3500 00
Paige Elizabeth Townsend 1823 US Rte 5 North Windsor, VT 05089	None	N/A	College Scholarship	Person X Business \$3500 00
Melissa Peyton Conant PO Box 1256 Block Island, RI 02807	None	N/A	College Scholarship	Person X Business \$3500 00
Megan Mary Mitchell PO Box 656 Block Island, RI 02807	None	N/A	College Scholarship	Person X Business \$3500 00
David Gaffett Spiers PO Box 1177 Block Island, RI 02807	None	N/A	College Scholarship	Person X Business \$3500 00
Bethany Aldrich 15 Ainsworth Road Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Amber Chicione 3 Alderwood Ct Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Richard Dillehay 36 Puckershire Avenue Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Jillian LaPlante 5 Nielsen Street Claremont, NH 03743	None	N/A	College Scholarship	Person X Business \$3500 00
Bridgette Aumand 251 Upper Walpole Road Walpole, NH 03608	None	N/A	College Scholarship	Person X Business \$3500 00
Welcome Frye 51 Cabot Lane Walpole, NH 03608	None	N/A	College Scholarship	Person X Business \$3500 00
Brian T. Perry 270 Old Cheshire Turnpike Walpole, NH 03608	None	N/A	College Scholarship	Person X Business \$3500 00
Bianca Brenz 11 Old Boston Road, Apt 401 Tewksbury, MA 01876	None	N/A	College Scholarship	Person X Business \$3500.00
Isaac Colin Dayno 91 Burnham Road East Thetford, VT 05043	None	N/A	College Scholarship	Person X Business \$3500 00
Christopher Thomas Morse 2 Mulhern Farm Road Hanover, NH 03755	None	N/A	College Scholarship	Person X Business \$3500 00
Hien T Nguyen 28 Parkhurst Street Lebanon, NH 03766	None	N/A	College Scholarship	Person X Business \$3500 00
Cody Patch 33 Walhowdon Way Lebanon, NH 03766	None	N/A	College Scholarship	Person X Business \$3500 00
Parker Sorenson 97 Wellington Circle Lebanon, NH 03766	None	N/A	College Scholarship	Person X Business \$3500 00
Bethany Adam 12 Blain Road Canaan, NH 03741	None	N/A	College Scholarship	Person X Business \$3500 00
Kevin Edward Kosiorek 929 Lockehaven Road Enfield, NH 03748	None	N/A	College Scholarship	Person X Business \$3500 00

**THE ROBERT AND JOYCE OBERKOTTER FAMILY FOUNDATION**

**APPLICATION FOR SCHOLARSHIP**

1. Name\_\_\_\_\_
2. Address\_\_\_\_\_
3. City/State/Zip\_\_\_\_\_
4. Home Telephone Number\_\_\_\_\_
5. Social Security Number\_\_\_\_\_
6. Date of Birth\_\_\_\_\_ 6A. Email \_\_\_\_\_
7. School Presently Attending\_\_\_\_\_
8. Please list the post-secondary schools that you have applied to or intend to apply to for admission in 2010:  
  
First Choice\_\_\_\_\_
- Second Choice\_\_\_\_\_
- Third Choice\_\_\_\_\_
9. What is your intended major or course of study?\_\_\_\_\_
10. Please list your school activities (sports, clubs, offices, awards and other extra-curricular activities):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. Please list any community activities with which you have been involved:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. Please list any employment history:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

13. Please list and describe any noteworthy service to school or family:

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For items 9 through 12, if additional space is needed, please attach no more than one additional typed, double-spaced with one inch (1") margins, 8.5" x 11" sheet.

13. Additional items to be included with this application:
- A. Official high school transcript or other official high school document evidencing anticipated graduation by June 30, 2010;
  - B. Two letters of recommendation; and
  - C. Narrative essay.
  - D. Refer to the Robert And Joyce Oberkotter Family Foundation Criteria/Requirements for specific requirements regarding the letters of recommendation and narrative essay.

**All scholarship submissions must be received by the Foundation no later than February 12, 2010. Submissions must include four (4) copies of a fully completed application and four copies of all of the items required in number 13 above. Incomplete or late submissions shall not be considered by the Foundation. All submissions must be made to the following address:**

**The Robert and Joyce Oberkotter Family Foundation  
P.O. Box 45  
Newport, New Hampshire 03773**

**All questions regarding this scholarship should be directed to your high school guidance/college counselor.**



## **THE ROBERT AND JOYCE OBERKOTTER FAMILY FOUNDATION**

### **CRITERIA/REQUIREMENTS**

#### **1. Eligibility**

Full-time high school seniors in good standing, attending (i) Fall Mountain Regional High School, (ii) Kearsarge Regional High School, (iii) Kimball Union Academy, (iv) Mid-Vermont Christian School, (v) Mount Royal Academy, (vi) Newport Middle High School, (vii) Stevens High School (Claremont), (viii) Lebanon High School, (ix) Mascoma Valley Regional High School, (x) the Oliverian School, (xi) Windsor (Vermont) High School, (xii) Procter Academy or (xiii) The Block Island School are eligible to apply. Each applicant must be on track to graduate from high school by June 30, 2011 and to enroll in a post-secondary educational institution in the fall of 2011, and must provide a transcript or other official high school document evidencing anticipated graduation by June 30, 2011.

Eligible applicants shall demonstrate two or more of the following:

- (a) Strong moral and ethical character;
- (b) Service to school, community and/or family;
- (c) Part-time work;
- (d) Extra-curricular activities; and/or
- (e) Sports participation.

#### **2. Eligible Institutions**

Applicants must intend to enroll in an accredited, college, university, trade, technical or vocational school, or similar post-secondary educational institution (including institutions with two year degree programs) in the fall of 2011.

#### **3. Deadline For Submission**

Completed applications must be received by the Foundation no later than February 4, 2011. The Foundation cannot be responsible for incomplete or late submissions. Completed applications should be sent only to the following address:

The Robert and Joyce Oberkotter Family Foundation  
P.O. Box 45  
Newport, New Hampshire 03773

4. Application Procedure

(a) Application: Each applicant must complete the attached application in full. All applications must be typed. Handwritten submissions will not be considered.

(b) Letters of Recommendation: Each applicant will be required to submit **two (2)** letters of recommendation. **One** shall be from an educator in the high school that the applicant is presently attending or from an individual who supervises the applicant's sports participation or an extra-curricular activity, and **one** shall be from an individual not specifically involved with the applicant's education, sports or extra-curricular activities, such as a family friend, employer, pastor, or other such individual. Each letter of recommendation (i) shall be signed by the person providing the recommendation; (ii) must include the name, address and telephone number of the person providing the recommendation, (iii) should describe the characteristics of the applicant that exemplify the eligibility criteria of the scholarship, and (iv) shall be included with the applicant's submission and should not be sent separately or directly by the person providing the recommendation. Letters of Recommendation need not be in separate or sealed envelopes, but instead should be collated with the application, as further explained in the Application for Scholarship. The Foundation will not be responsible for letters of recommendation which are not included in the applicant's submission packet whether or not such letters of recommendation are received separately by the Foundation. The Foundation reserves the right to contact any or all of the individuals providing recommendations.

(c) Narrative Essay: Together with the completed application and the two letters of recommendation, each applicant shall submit a typewritten narrative essay on one of the following topics: (i) a life changing experience (good or bad), (ii) the most unforgettable person the applicant has met (who is not a relative of the applicant), and why, (iii) a person (who is not a relative of the applicant) who has made a strong impression on, or has changed the life of, the applicant, and why, or (iv) the most memorable book that the applicant has read that was not assigned in school. The essay should not be a narrative summary of the other information already provided in the application, but rather is intended to give the applicant an opportunity to tell the Foundation something about the applicant that may not be evident from the other information supplied. Essays must be at least one full, typed, double-spaced page, using reasonable-sized font, but shall not be more than two full, typed, double-spaced pages with one inch (1") margins, using 8.5" x 11" paper. Essays that do not meet the length guidelines will not be considered.

(d) Office School Transcript. Submit and official high school transcript or other official high school document evidencing anticipated graduation by June 30, 2011.

(e) **Each applicant must submit four (4) full copies of the entire application, which includes the application form, attachment to application form, transcript, letters of recommendation and narrative essay, collated in that order. Each set of copies will be read and reviewed by a separate member of the Foundation's Board of Directors, and any incomplete application set will not be considered.**

5.     Scholarship Award

The Foundation intends to award scholarships in the amount of \$3,500 each to up to two students from each of the eligible high schools who meet all of the scholarship criteria. Scholarship awards will be made directly to the institution in which the recipient enrolls for the fall, 2011 term. In the event that any scholarship recipient does not provide adequate evidence of enrollment for the fall, 2011 term, the scholarship to that recipient may be revoked at the election of the Foundation. The Foundation reserves the right to award more or less than two scholarships per eligible high school, depending on the number and the quality of submissions received from each high school. Scholarship recipients and their high schools will be notified on or about April 8, 2011.

**Please provide (i) a valid and regularly checked email address and (ii) a regularly checked telephone or cell phone number with voice mail as requested on the application form.**

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