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Fom 990-PF

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

Open to Public Inspection

Department of the Treasury Internal Revenue Service Do not enter Social Security numbers on this form as it may be made public.
 Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

FOI	calen	dar year 2013 or tax year beginning		, and	a ending			_
Nar	ne of fou	indation			A Employer	r identification number		
		& Verna M Peterson Foundation						
		i street (or PO box number if mail is not delivered to street address)	1	Room/suite		36-7001111		_
_		glas Road	1		B Telephone	e number (see instruction	ns)	
	or town		ZIP cod			(0.4.5), 0.00, 0.70		
	wners (60515		 	(815) 988-873		=
For	eign coui	ntry name Foreign province/state/county	Foreign	postal code	C If exempt	ion application is pendin	g, check here 🕨	┙
_	Chook	all that apply	. f - f		┦,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			7
G	CHECK		of a former pub	one charity	1. Foreig	n organizations, check h	ere P	_
		Final return Amended return			_	n organizations meeting		\neg
	Chl-	Address change Name change				here and attach comput foundation status was te	_	_
Н		type of organization X Section 501(c)(3) exempt priv				07(b)(1)(A), check here	► [
ᆜ		on 4947(a)(1) nonexempt charitable trust			_			
ı		parket value of all assets at J Accounting method	X Cash	_ Accrua	F II III E IOUI	ndation is in a 60-month		_
		f year (from Part II, col (c), Other (specify)			under sec	tion 507(b)(1)(B), check	here ►	┙
		5) ▶ \$ 396,551 (Part I, column (d) must be	e on cash basis) 	_1	r		_
	art I	Analysis of Revenue and Expenses (The total of	(a) Revenue a		let investment	(c) Adjusted net	(d) Disbursements for charitable	3
		amounts in columns (b), (c), and (d) may not necessarily	expenses per books	() (3/)	ıncome	ıncome	purposes	
		equal the amounts in column (a) (see instructions))	20010				(cash basis only)	_
	1	Contributions, gifts, grants, etc , received (attach schedule)				<u> </u>		_
	2	Check ► ☐ if the foundation is not required to attach Sch B		205		9.005		_1
	3	Interest on savings and temporary cash investments		235	16	-1		_
	4	Dividends and interest from securities	4,	873	4,873	4,873		_
	5a	Gross rents						_
	b	Net rental income or (loss)						_
ne	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 25,000						-,
Revenue	b 7	Capital gain net income (from Part IV, line 2)				<u> </u>		
é	8	Net short-term capital gain						
œ	9	Income modifications						-
	10a	Gross sales less returns and allowances						1
	b	Less Cost of goods sold						1
	С	Gross profit or (loss) (attach schedule)						-
	11	Other income (attach schedule)						_
	12	Total. Add lines 1 through 11	8.	108	4,889	8,108		
	13	Compensation of officers, directors, trustees, etc			'			_
enses	14	Other employee salaries and wages						_
ü	15	Pension plans, employee benefits	-					_
ğ	16a	Legal fees (attach schedule)	1	REC	FIVE			
Ŵ	b	Accounting fees (attach schedule)		850		(0)	85	0
<u>×</u>	С	Other professional fees (attach schedule)	A06	MAY.	1 0 2014 -	ISI		
rat	17	Interest	اِکَا اِ	<u> </u>	L & ZU14		ļ	_
ist	18	Taxes (attach schedule) (see instructions)	<u> </u> '	67	Walter Street Street Street	181	6	<u>7</u>
Ë	19	Depreciation (attach schedule) and depletion		OGD	EN. UT	 - 		
두	20	Occupancy						_
and Administrative Exp	21	Travel, conferences, and meetings	-				 	_
Juc.	22	Printing and publications Other expanses (attach schedule)	ļ					—
9	23	Other expenses (attach schedule) Total operating and administrative expenses.					 	—
ti	24	Add lines 13 through 23		917	0	d	01	7
řa	25	Contributions, gifts, grants paid		,000		 	91 16,00	_
Operating	26	Total expenses and disbursements. Add lines 24 and 25				 	Ť	
<u> </u>	 		16	917	0	<u> </u>	16,91	<u> </u>
	27	Subtract line 26 from line 12		,809				
	l a	Excess of revenue over expenses and disbursements Net investment income (if negative, enter -0-)	-8	,009	4,889		 	_
	b	Adjusted not income (if negative, enter 0.)			4,009	0.400	 	_

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2013)

D	- T T	Attached schedules and amounts in the description column	Beginning of year	End o	of year	
126	ırt II	Balance Sheets Should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value	
	1	Cash—non-interest-bearing .				
	2	Savings and temporary cash investments	141,118	157,795	157,795	
	3	Accounts receivable				
		Less allowance for doubtful accounts				
	4	Pledges receivable	1 I		contains automaticatives on the con-	
		Less allowance for doubtful accounts	1			
	5	Grants receivable .				
	6	Receivables due from officers, directors, trustees, and other				
		disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule)				
		Less allowance for doubtful accounts	•			
ts	8	Inventories for sale or use				
Assets	9	Prepaid expenses and deferred charges				
As	10a	Investments—U S and state government obligations (attach schedule)	77,669	51,768	51,741	
	b	Investments—corporate stock (attach schedule)	121,679	121,679	187,015	
	С	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis				
		Less accumulated depreciation (attach schedule)	1			
	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	Total assets (to be completed by all filers—see the				
		instructions Also, see page 1, item I)	340,466	331,242	396,551	
	17	Accounts payable and accrued expenses				
s	18	Grants payable		·		
Ë	19	Deferred revenue				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				
<u></u>	21	Mortgages and other notes payable (attach schedule)				
_	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)	0	0		
"		Foundations that follow SFAS 117, check here			,	
ä		and complete lines 24 through 26 and lines 30 and 31.				
alances	24	Unrestricted				
	25	Temporarily restricted				
P	26	Permanently restricted				
or Fund B		Foundations that do not follow SFAS 117, check here 🕒 🔯				
Η_		and complete lines 27 through 31.				
0	27	Capital stock, trust principal, or current funds	340,466	331,242		
Net Assets	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
155	29	Retained earnings, accumulated income, endowment, or other funds				
f A	30	Total net assets or fund balances (see instructions)	340,466	331,242		
ž	31	Total liabilities and net assets/fund balances (see				
		instructions)	340,466	331,242	<u>. </u>	
	art III	Analysis of Changes in Net Assets or Fund Balances		<u></u>	· ·	
1		net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree v	1 .		
		of-year figure reported on prior year's return)		1	340,466	
2		r amount from Part I, line 27a		2	-8,809	
3				3		
4		lines 1, 2, and 3		4	331,657	
5		eases not included in line 2 (itemize) Account balance adjusting		5	415	
6	Total	net assets or fund balances at end of year (line 4 minus line 5)-Pa	rt II, column (b), line 30	6	331,242	

	(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							(d) Date sold (mo , day, yr)
1a	Boerne TX School District				Р		12/3/2004	2/1/2013
<u>b</u>			··		·			
<u>c</u>								
<u>d</u> e								
	(e) Gross sales price	(f) Depreciation allowed (or allowable)			other basis nse of sale		(h) Gain or (loss) (e) plus (f) minus (g)	
a	25,000				25,000			0
b						-		
c d						 		
<u>u</u> 			 			\vdash		· · · · · · · · · · · · · · · · · · ·
	Complete only for assets sh	nowing gain in column (h) and owned	by the	foundation	on 12/31/69		(I) O = (O -1	(1-)
	(i) F M ∨ as of 12/31/69	(j) Adjusted basis as of 12/31/69		(k) Exces	s of col(ı) (j), ıf any	(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
a								0
b								· <u> </u>
<u>_</u>								
<u>d</u> e								
2	Capital gain net income or			nter in Par -0- in Par		2		
3	, -	or (loss) as defined in sections 1 line 8, column (c) (see instruction	222(5)	and (6)				
	Part I, line 8	inte o, column (c) (see instruction	113) 11 ((1033), Citte	}	3		C
Part		der Section 4940(e) for Redu	uced :	Tax on N	et Investment	Inco	me	
Was t		re this part blank section 4942 tax on the distributal qualify under section 4940(e) Do				e perio	od?	☐ Yes ☒ No
1	Enter the appropriate amo	unt in each column for each year	, see th	ne instructi	ions before makii	ng any	entries	
Cal	(a) Base period years endar year (or tax year beginning in)	(b) Adjusted qualifying distributions	s	Net value o	(c) of noncharitable-use a	ssets		(d) ribution ratio livided by col (c))
	2012	1	7,917		37	0,217		0 048396
	2011	•	6,841			5,673		0 046055
	2010		7,157			3,418		0 047210
	2009 2008		5,646 7,456			2,774 3,925		0 043129 0 045467
	2000		7,4001			5,325		0 043407
2	Total of line 1, column (d) Average distribution ratio f	for the 5-year base period—divide	e the to	otal on line	2 by 5, or by the		2	0 230257
	•	dation has been in existence if les					3	0 046051
4	Enter the net value of none	charitable-use assets for 2013 fro	m Par	t X, line 5			4	384,905
5	Multiply line 4 by line 3						5	17,725
6	Enter 1% of net investmen	nt income (1% of Part I, line 27b)					6	49
7	Add lines 5 and 6						7	17,774
8	Enter qualifying distribution						8	16,917
8	· · · · ·	ns from Part XII, line 4 ter than line 7, check the box in P	Part VI,	line 1b, ai	nd complete that	part u		

Part \	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see ins	tructi	ons)				
	Exempt operating foundations described in section 4940(d)(2), check here Date of ruling or determination letter Cattach copy of letter if necessary—see instructions)						
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check	1		9	8		
	here ▶ ☐ and enter 1% of Part I, line 27b						
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of		ļ				
_	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	-		<u> </u>		
3	Add lines 1 and 2 . Subtitle A (recomp) toy (demonts parties 4047(a)(4) trusts and toyoble foundations only. Others onter 0.)	3	-	9	<u>8 </u>		
4 5	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		9	8		
6	Credits/Payments	-			-		
а	2013 estimated tax payments and 2012 overpayment credited to 2013 6a 6a						
b	Exempt foreign organizations—tax withheld at source 6b	1					
С	Tax paid with application for extension of time to file (Form 8868) 6c						
d	Backup withholding erroneously withheld 6d 6d]					
7	Total credits and payments Add lines 6a through 6d			0			
8	Enter any penalty for underpayment of estimated tax. Check here						
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed						
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10						
11	Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded	11	<u></u>		0		
1a	VII-A Statements Regarding Activities During the tax year, did the foundation attempt to influence any national, state, or local legislation or did	ıt		Ye	s No		
Id	participate or intervene in any political campaign?	ıı	1:		X		
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see			1	 		
-	Instructions for the definition)?						
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materi	als	1		X		
	published or distributed by the foundation in connection with the activities						
С	Did the foundation file Form 1120-POL for this year?						
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year						
	(1) On the foundation ▶\$ (2) On foundation managers ▶\$						
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imp	osed					
•	on foundation managers \$		<u> </u>				
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, a						
ā	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the change	es	3		X		
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4	_	X X		
b 5	If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year?		4	$\overline{}$	X		
3	If "Yes," attach the statement required by General Instruction T		F		 ^-		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			ļ			
	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				
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	<u> </u>			
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)						
	Illinois						
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney Ger	eral	_				
•	(or designate) of each state as required by General Instruction G? If "No," attach explanation	(2)	8	b X			
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV		-		-		
	"Yes," complete Part XIV) · 'I'		.	X		
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing	their	H		 ^		
	names and addresses		1	0	X_		
				- : -			

Form 990-PF (2013)

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 make a distribution to a donor advised fund over which the foundation or a disqualified	H''H		_^_
12	person had advisory privileges? If "Yes," attach statement (see instructions)	12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	_^_
13	Website address N/A		_^_	
14	The heads are in ease of N Linda Determine Tolophono no N (915) 09	8-873	1	
	Located at ► 4915 Douglas Road Downers Grove IL ZIP+4 ► 60515	9. 9		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here		ا	\
13	and enter the amount of tax-exempt interest received or accrued during the year			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority		Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of	İ		
	the foreign country	<u> </u>		
Part	VII-B Statements Regarding Activities for Which Form 4720 May Be Required	1		
	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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No			
	(c) /			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Li Yes X 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)?			
	(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)			ļ
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 instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b	N/A	
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		χ
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))			į
а	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? Yes X No			
	If "Yes," list the years ▶ 20, 20, 20, 20			}
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to			
	all years listed, answer "No" and attach statement—see instructions)	2b	N/A	
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			ł
	▶ 20, 20, 20	ļ		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise			
	at any time during the year?			
b	If "Yes," did it have excess business holdings in 2013 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 2013)	3b	N/A	1
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 2013?	4b	-	×
	custings backage stort ton that accuston total feebarah acids and markage and accused an ending			1

Page 5

Part	VII-B Statement	s Regarding Activities	<u>for Wi</u>	<u>hich Form 4</u>	4720 N	<u>llay Be Re</u>	quire	d (contin	ued)			
5a		foundation pay or incur any da, or otherwise attempt to it			section	4945(e))?	<u>-</u>	☐ Yes	X No			,
		me of any specific public ele , any voter registration drive		see section 49	955), or	to carry on	,	Yes	X No			
	(3) Provide a grant to a	in individual for travel, study	, or othe	er sımılar pur <mark>j</mark>	oses?			☐ Yes	⊠ No			
		in organization other than a 2), or (3), or section 4940(d)				n described	ın	☐ Yes	X No			,
		oose other than religious, che prevention of cruelty to chil			terary, o	or education	nal	☐ Yes	X No			
b	If any answer is "Yes" t	o 5a(1)-(5), did any of the ti	ransacti	ions fail to qu	alıfy un	der the exc	eptions	describe	d in			1
	Regulations section 53	4945 or in a current notice i	regardır	ng disaster as	ssistand	æ (see instr	uctions)?		5b	N/A	
С	If the answer is "Yes" to	n a current notice regarding o question 5a(4), does the fo expenditure responsibility fo	oundatio	on claim exen				☐ Yes	► □			!
		ement required by Regulation	_		-5(d)							
6a		ing the year, receive any fur				oay premiur	ms	☐ Yes	☐ Yes 🏻 No			;]
b	•	ing the year, pay premiums,	directly	or indirectly.	on a p	ersonal ben	efit con	tract?	_	6b		X
_	If "Yes" to 6b, file Form	· · · · · · · · · · · · · · · · · · ·		,,,	ч ч. р							
7a	At any time during the tax	year, was the foundation a pa	rtv to a ı	prohibited tax s	shelter t	ransaction?		☐ Yes	X No		İ	
b		tion receive any proceeds of					e transa			7b	N/A	
Part	VIII Information	About Officers, Directo	ors, Tr	ustees, Fo	undati	on Manag	gers, t	lighly P	aid Em	ploye	es,	
	and Contrac	tors										
1	List all officers, direct	ors, trustees, foundation i	manage	ers and their	compe	ensation (s	ee insti	ructions)				
	(a) Name and	d address	hou	e, and average rs per week ed to position	i (if r	mpensation not paid, iter -0-)	emplo	Contribution byee benefit erred compe	plans	(e) Expe	ense acc allowan	
	Peterson Douglas Road Downers	Grove, IL 60515	Trustee	e 10		0			0			0
	L Peterson		Truste	е								
c/o Lii	nda Peterson 4915 Doug	las Rd Downers Grove, II		10		0			0			0
2	Compensation of five "NONE."	highest-paid employees (other ti	han those in	cluded	on line 1—	see ins	structions	s). If no	ne, ent	er	
	(a) Name and address of each	n employee paid more than \$50,000		(b) Title, and a hours per w devoted to po	/eek	(c) Comper	isation	(d) Contrib employee plans and compen	benefit deferred	(e) Expe	ense acc allowan	
NONE			•									
				, ,				-		-		
			• • • • • •									
												
						<u> </u>						
T = 4 : 1	acceptance of the country	#FC 000		L				L	_			
rotal	number of other employ	ees paid over \$50,000										0

Pai	Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid En and Contractors (continued)	nployees,
3	Five highest-paid independent contractors for professional services (see instructions). If none, enter "NON	E."
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NON	E	
		- -
Tota	I number of others receiving over \$50,000 for professional services	
Pa	rt IX-A Summary of Direct Charitable Activities	
	t the foundation's four largest direct chantable activities during the tax year. Include relevant statistical information such as the number of januations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	N/A	
2		
3		
4		
	•	
Do	rt IX-B Summary of Program-Related Investments (see instructions)	
_	escribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
	N/A	7 till dang
•	14/1	
2		 .
All	other program-related investments. See instructions	
3		
Tota	I. Add lines 1 through 3	(

Part	X Minimum Investment Return (All domestic foundations must complete this part. Foreig	n foundati	ons,
	see instructions)		
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	228,798
b	Average of monthly cash balances .	1b	161,968
С	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	390,766
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	<u></u>
3	Subtract line 2 from line 1d	3	390,766
4	Cash deemed held for charitable activities Enter 1 ½ % of line 3 (for greater amount, see		
	instructions)	4	5,861
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	384,905
6	Minimum investment return. Enter 5% of line 5	6	19,245
Part			
			40.045
1	Minimum investment return from Part X, line 6	1	19,245
2a	Tax on investment income for 2013 from Part VI, line 5 2a 98	4	
b	Income tax for 2013 (This does not include the tax from Part VI)		00
C	Add lines 2a and 2b	2c	98
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	19,147
4	Recoveries of amounts treated as qualifying distributions	4	40.447
5	Add lines 3 and 4	5	19,147
6 7	Deduction from distributable amount (see instructions)	6	
′	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,	,	10 117
	line 1	7	19,147
Part	XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	16,917
b	Program-related investments—total from Part IX-B	1b	
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		
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	16,917
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	16,917
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating when	ther the fou	ndation
	gualifies for the section 4940(a) reduction of tay in those years		

Part	XIII Undistributed Income (see instructions	s)			
		(a)	(b)	(c)	(d)
1	Distributable amount for 2013 from Part XI,	Corpus	Years prior to 2012	2012	2013
	line 7				19,147
2	Undistributed income, if any, as of the end of 2013				
а	Enter amount for 2012 only			16,562	
b	Total for prior years 20, 20, 20				
3	Excess distributions carryover, if any, to 2013				
а	From 2008				
b	From 2009]			
С	From 2010]			
d	From 2011	}			
е	From 2012]			
f	Total of lines 3a through e	0			
4	Qualifying distributions for 2013 from Part XII,				
	line 4 ▶ \$ 16,917				
а	Applied to 2012, but not more than line 2a			16,562	
	Applied to undistributed income of prior years				
	(Election required—see instructions)				
С	Treated as distributions out of corpus (Election				• •
_	required—see instructions)]			
d	Applied to 2013 distributable amount				355
	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2013				
·	(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				
Ū	indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
	Prior years' undistributed income Subtract				
	line 4b from line 2b		0		
С	Enter the amount of prior years' undistributed	-			
·	income for which a notice of deficiency has				
	been issued, or on which the section 4942(a)				
	tax has been previously assessed				
d	Subtract line 6c from line 6b Taxable			<u> </u>	
u	amount—see instructions				
е	Undistributed income for 2012 Subtract line				
e	4a from line 2a Taxable amount—see				
	instructions			ol	
f	Undistributed income for 2013 Subtract lines			1	
'	4d and 5 from line 1. This amount must be				
	distributed in 2014			<u> </u>	19 700
7	Amounts treated as distributions out of corpus				18,792
,	to satisfy requirements imposed by section				
	170(b)(1)(F) or 4942(g)(3) (see instructions)				
	· · · · · · · · · · · · · · · · · · ·				
8	Excess distributions carryover from 2008 not]	
^	applied on line 5 or line 7 (see instructions)			 -	
9	Excess distributions carryover to 2014.				
40	Subtract lines 7 and 8 from line 6a			 	
10	Analysis of line 9				
-	Excess from 2009	4			
b	Excess from 2010	4			
C	Excess from 2011	4			
d	Excess from 2012	4			
e	Excess from 2013				

Part .	XIV Private Operating Foundat	ions (see instru	ctions and Part \	VII-A, question 9)	N/A
1a						
	foundation, and the ruling is effective for	2013, enter the d	date of the ruling	•		
b	Check box to indicate whether the found	dation is a private	operating foundation	on described in sec	ction	(3) or 4942(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		(e) Total
	income from Part I or the minimum investment return from Part X for	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) lotal
	each year listed .					0
b	85% of line 2a					0
С	Qualifying distributions from Part XII,					
	line 4 for each year listed				<u> </u>	0
d	Amounts included in line 2c not used directly					_
	for active conduct of exempt activities				ļ	0
е	Qualifying distributions made directly					
	for active conduct of exempt activities					
_	Subtract line 2d from line 2c				 -	0
3	Complete 3a, b, or c for the					
а	alternative test relied upon "Assets" alternative test—enter				1	
а	(1) Value of all assets					0
	(2) Value of assets qualifying under				 	
	section 4942(j)(3)(B)(i)					l 0
b	"Endowment" alternative test-enter 2/3	,				
	of minimum investment return shown in Part X, line 6 for each year listed					0
С	"Support" alternative test—enter					
	(1) Total support other than gross					
	investment income (interest,					
	dividends, rents, payments on securities loans (section		1	•		
	512(a)(5)), or royalties)					0
	(2) Support from general public and 5 or more exempt		-			
	organizations as provided in					
	section 4942(j)(3)(B)(III)				ļ	0
	(3) Largest amount of support from					
	an exempt organization		 		<u> </u>	0
Part	(4) Gross investment income XV Supplementary Information	. (Complete th	ic part only if th	o foundation h	ad \$5 000 as ma	0
rait	any time during the year—			ie ioundation in	au \$5,000 or mo	ire iii assets at
1	Information Regarding Foundation M		13./			, <u></u>
-	List any managers of the foundation wh		d more than 2% of	the total contribution	ons received by the	foundation
_	before the close of any tax year (but on					
None						
	List any managers of the foundation wh	o own 10% or mo	re of the stock of a	corporation (or an	equally large portion	on of the
	ownership of a partnership or other enti	ty) of which the fo	undation has a 109	% or greater interes	st	
None					···	
2	Information Regarding Contribution,	Grant, Gift, Loan	, Scholarship, etc	., Programs:		
	Check here ▶ ☐ If the foundation or					
	unsolicited requests for funds. If the four under other conditions, complete items		ns, grams, etc. (see	e instructions) to in	dividuals of organiz	zations
					an abaylal ba adda	
а	The name, address, and telephone nun	nber or e-mail add	iress of the person	to whom application	ons snould be addre	essea
Linda	J Peterson 4915 Douglas Road Downer	s Grove II 60515	(815) 988-8734			
	The form in which applications should be			iterials they should	ınclude	
	• •		,	·		
	Statement for Line 2A				-	
	Any submission deadlines					
	Statement for Line 2A Any restrictions or limitations on awards	such as by geor	ranhical areas oh	aritable fields kind	s of institutions or	other
u	factors	s, such as by geog	grapinoai areas, Ul	antable licius, Killu	o or montunons, or	Outer
See S	Statement for Line 2A					

Form 990-PF (2013)

Total

Part XV Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation show any relationship to Purpose of grant or status of Amount any foundation manager contribution recipient Name and address (home or business) or substantial contributor Paid during the year PC Heartland Comm Church General Purpose 2,000 1280 S Alpine Rd Rockford, IL 61108 Herrick PTA PC General Purpose 5,000 4435 Middaugh Ave Downers Grove, IL 60515 General Purpose Morton Arboretum PC 5,000 4100 Illinois Rt 53 Lisle. IL 60532 PC General Purpose 1,000 Benedictine University 700 College Rd Lisle, IL 60532 PC General Purpose Heifer International 1,000 PO Box 6021 Albert Lea, MN 56007-6621 Tillers International PC General Purpose 1.000 10515 East OP Avenue Scotts, MI 49088 General Purpose PC **Beloit College** 1,000 700 College St Beloit, WI 53511-5595 **Total** За 16,000 Approved for future payment

	•	Analysis of Income-Producing Ac				540 540 544	-
∟nte	er gros	s amounts unless otherwise indicated	(a) Business code	(b) Amount	(c) Exclusion code	on 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1	Progr	ram service revenue	Busiliess code	Amount	Exclusion code	Amount	(See instructions)
	a _						
	b _						
	c _						
	d _						
	e _						
	f <u> </u>				<u> </u>		
_	_	Fees and contracts from government agencies			 	·	
2		bership dues and assessments					2 225
3		est on savings and temporary cash investments lends and interest from securities					3,235 4,873
4 5		rental income or (loss) from real estate			 	 	4,673
J		Debt-financed property					
		Not debt-financed property					·
6		rental income or (loss) from personal property					
7		r investment income					,
8		or (loss) from sales of assets other than inventory				····	
9		ncome or (loss) from special events				-	
10		s profit or (loss) from sales of inventory		···			
11		r revenue a					
	d _						
	е _						
		otal Add columns (b), (d), and (e)		0		0	8,108
		I. Add line 12, columns (b), (d), and (e)				13	8,108
_		sheet in line 13 instructions to verify calculations			4 D		
1				ent ot Exemo	r Piirnneae		
		Relationship of Activities to the A					
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur	ne is reported in c poses (other than	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the les) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the ies) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)
Lin	e No. ▼	Explain below how each activity for which incon accomplishment of the foundation's exempt pur Enable Foundation to make contributions to ch	ne is reported in c poses (other than arities	olumn (e) of Part	XVI-A contributed	importantly to the es) (See instruction	ons)

Donald A & Verna M Peterson Foundation 36-7001111 Form'990-PF (2013) Page 13 Information Regarding Transfers To and Transactions and Relationships With Noncharitable Part XVII **Exempt Organizations** Did the organization directly or indirectly engage in any of the following with any other organization described Yes No in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash 1a(1) (2) Other assets 1a(2) **b** Other transactions 1b(1) (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization 1b(2) 1b(3) (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements 1b(4) (5) Loans or loan guarantees 1b(5) 1b(6) (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 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. (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements (a) Line no (b) Amount involved Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations ☐ Yes ☒ No described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? b If "Yes," complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship 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,

Paid	Print/Type preparer		Preparer's signature	Date		Check X if	PTIN
	Randall Talley		Randall Talley	5/5/2014	4	self-employed	P01432536
Prepar	I Firm's name ►	Hallock & Talley			Firm's	EIN ►	
Use O	Firm's address	120 W State St Suite	301, Rockford, IL 61101		Phone	no (815)	968-7568

correct, and corpolete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

Sign

Here

nature of officer of trustee

May the IRS discuss this return with the preparer shown below

(see instructions)? X Yes

Part'l, Line 16b (990-PF) - Accounting Fees

	<u> </u>				
		850	0	0	850
				, , ,	Disbursements
		Revenue and			for Charitable
		Expenses per	Net Investment	Adjusted Net	Purposes
	Description	Books	Income	Income	(Cash Basis Only)
1	Accounting Fees	850			850

Part I, Line 18 (990-PF) - Taxes

		67	0) 67
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Federal income tax	52			52
2	Illinois Charity Bureau	15			15

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Part	

		Federal	699'22	51,768	54,334	51,741		
		State/Local	0	0	0	0		
		Num Shares/	Book Value	Book Value	FMV	FM<	State/Local	
	Description	Face Value	Beg of Year	End of Year	Beg of Year	End of Year	Obligation	
-	Mineral Wells Sch Dist	25,000	25,575	25,575	27,531	26,323		
7	Northern Arizona Univ Revs Sys	25,000	26,193	26,193	26,803	25,418		
က	Bourne TX School Dist	25,000	25,901	0	0	0		

Part II, Line 10b (990-PF) - Investments - Corporate Stock

			121,679	121,679		158,611
L		Num Shares/	Book Value	Book Value		
	Description	Face Value	Beg of Year	End of Year		Beg of Year
-	1 AT&T	800	21,033	21,033	3	
7	Bank of America	1,442	10,550	10,550	_	16,742
က	Coca-Cola	800	21,865	21,865		
4	Conoco Phillips	350	15,681	15,681		20,296
က	Exxon Mobil	300	19,760	19,760		25,965
ဖ	Phillips 66	175	4,660	4,660		9,293
_	Wal Mart Stores	400	21,409	21,409	1	27,292
∞	8 Zunch Insurance Group	114	6,721	6,721		3,055