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

2013

OMB No 1545-0052

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.

For calendar year 2013, or tax year beginning , 2013, and ending Jul 1 Jun 30 2014 Name of foundation Employer identification number 82-0577634 Robert & Joyce Oberkotter Family Foundation Number and street (or P O box number if mail is not delivered to street address) Room/suite R Telephone number (see the instructions) P.O. Box 45 (603) 543-0073 City or town, state or province, country, and ZIP or foreign postal code If exemption application is pending, check here. С Newport NH 03773 Check all that apply: Initial Return of a former public charity Initial return **D** 1 Foreign organizations, check here . . . . . Final return Amended return 2 Foreign organizations meeting the 85% test, check Address change Name change Check type of organization: X Section 501(c)(3) exempt private foundation Ε Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation If private foundation status was terminated under section 507(b)(1)(A), check here . . Fair market value of all assets at end of year Accounting method. Cash Accrual (from Part II, column (c), line 16) X Other (specify) Modified Cash F If the foundation is in a 60-month termination (Part I, column (d) must be on cash basis ) under section 507(b)(1)(B), check here . 11,322,429 Part Is Analysis of Revenue and (a) Revenue and (b) Net investment (c) Adjusted net (d) Disbursements Expenses (The total of amounts in columns (b), (c), and (d) may not necesfor charitable expenses per books income income purposes sarily equal the amounts in column (a) (cash basis only) (see instructions) ) Contributions, gifts, grants, etc, received (att sch) -2 X if the foundn is not req to att Sch B Interest on savings and temporary Dividends and interest from securities . . 325,011 325.011 325,011 5 a Gross rents . . . . . . **b** Net rental income or (loss) 6 a Net gain/(loss) from sale of assets not on line 10 REVERU **b** Gross sales price for all assets on line 6a Capital gain net income (from Part IV, line 2) . . · § /// 337,940 Net short-term capital gain . . . . **%**, ¢. Income modifications . . 9%; 10 a Gross sales less returns and allowances . . 2 1:1:10 b Less Cost of goods sold . . . 413413 ¥ 200 c Gross profit/(loss) (att sch) . . . . . . . . 1 Other income (attach schedule) . . . 63000 12 Total. Add lines 1 through 11.... 325,011. 662,951. 325,011 13 Compensation of officers, directors, trustees, etc -**14** Other employee salaries and wages . . . . 15 Pension plans, employee benefits . . 16 a Legal fees (attach schedule). L-16a Stmt. 23,837. 23,837. ADMINISTRATIVE 5,500 **b** Accounting fees (attach sch). . . . . . . 5,500 c Other prof fees (attach sch) . . . . . . . . Interest. . . . . . . . Taxes (attach schedule)(see instrs) Exclse . Tax 6,000 6,000 Depreciation (attach 19 Contract sch) and depletion 20 21 Travel, conferences, and meetings . . EXPENSES 22 Printing and publications . . . . . . 23 Other expenses (attach schedule) See-Line-23.Stmt 12,317 12,317. Total operating and administrative expenses. Add lines 13 through 23. 24 47,654. 47,654 25 Contributions, gifts, grants paid . O . . . 492,000. 492,000. 26 Total expenses (and disbursements. 539,654 539,654 Subtract-line.26 from line 12: 02 a Excess of revenue over expenses

and disbursements -214,643. b Net Investment income (if negative, enter -0-). . 662,951 325,011 C Adjusted net income (if negative, enter -0-)

	F (2013) Robert & Joyce Oberkotter Family Fo	Beginning of year	82-057 End o	
art II. B	Attached schedules and amounts in the description column 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			
<b>`</b> 2	Savings and temporary cash investments	88,147.	183,823.	183,823
3	Accounts receivable ▶		and the second s	
	Less allowance for doubtful accounts			
4	Pledges receivable			<u>.</u>
İ	Less: allowance for doubtful accounts			
5	Grants receivable			
	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach sch)	· * ·		<u> </u>
	Less allowance for doubtful accounts			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
	Investments — U.S and state government obligations (attach schedule)			
b	Investments — corporate stock (attach schedule) . L=10b. Stmt	9,884,633.	11,138,606.	11,138,606
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)			
16	Other assets (describe Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	9,972,780.	11,322,429.	11,322,429
	Accounts payable and accrued expenses	9,312,100.	11,322,423.	,
	Grants payable			12.00
	Deferred revenue			
	Loans from officers, directors, trustees, & other disqualified persons			* * · · · · · · · · · · · · · · · · · ·
- 1	Mortgages and other notes payable (attach schedule)			· * * * * * * * * * * * * * * * * * * *
	Other liabilities (describe			
23	Total liabilities (add lines 17 through 22)			10 X X X
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
24	Unrestricted			* *
	Temporarily restricted			1 , ,
D 26	Permanently restricted			1 *
B A	Foundations that do not follow SFAS 117, check here .  And complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds	9,307,906.	9,972,780.	**
~ I	Paid-in or capital surplus, or land, building, and equipment fund		1 0 1 7	
E   29	Retained earnings, accumulated income, endowment, or other funds	664,874.	1,349,649.	<u> </u>
	Total net assets or fund balances (see instructions)	9,972,780. 9,972,780.	11,322,429. 11,322,429.	,
art III /	Analysis of Changes in Net Assets or Fund Balance		11,022,123.	<b>.</b>
I Total	net assets or fund balances at beginning of year — Part II, column of-year figure reported on prior year's return)	(a), line 30 (must agree w	/ith	9,972,780
	amount from Part I, line 27a			-214,643
	ncreases not included in line 2 (itemize) Adj for Realiz		· · · · · · · · · · · · · · · · · · ·	1,564,292
	ines 1, 2, and 3			11,322,429

5 Decreases not included in line 2 (itemize)  $\dots$ 

5

6

(a) Last and describe the kind(s) of property sold (e.g., real estate, 2-story bnck warehouse; or common stock, 200 shares MLC Company)  (b) How acc P — Purch D — Dona					(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a Stock Sales			2		10/28/09	10/21/13
b						
<u> </u>						
d						
е	<del> </del>			.		
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basi plus expense of sale			(h) Gain or (e) plus (f) mil	
a 999,976.		662	2,036.			337,940.
b						_ <del>_</del>
С						
d						<u> </u>
е	<u> </u>					
	ng gain in column (h) and owned by the				(I) Gains (Col	
(i) Fair Market Value as of 12/31/69	(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				ain minus column (k) in -0-) or Losses (fro	
a						337,940.
b						
С						
d						
е						
2 Capital gain net income or (net o	capital loss) — If gain, also e	nter in Part I, line 7 r -0- in Part I, line 7		2		337,940.
3 Net short-term capital gain or (lo	ss) as defined in sections 1222(5) and	(6)				
If gain, also enter in Part I, line 8	s, column (c) (see instructions). If (loss)	), enter -0-		3		
	r Section 4940(e) for Reduce		ent Inco	ome		
(For optional use by domestic private t	foundations subject to the section 4940	(a) tax on net investment in	come.)			
If section 4940(d)(2) applies, leave this  Was the foundation liable for the section	•					
If 'Yes,' the foundation does not qualify	on 4942 tax on the distributable amour y under section 4940(e) Do not comple each column for each year; see the in-	ete this part		• • •	· · · Tyes	X No
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  (a)  Base period years Calendar year (or tax year		ete this part	y entnes.		Yes  (d)  Distribution mn (b) divided b	ratio
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  (a)  Base period years  Calendar year (or tax year beginning in)	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions	ete this part structions before making an (c) Net value of nonchantable-use asso	y entnes.		(d) Distribution	ratio y column (c))
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  (a)  Base period years  Calendar year (or tax year beginning in)  2012	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions	ete this part structions before making an (c) Net value of nonchantable-use asso	ets		(d) Distribution	ratio y column (c))
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  (a)  Base period years Calendar year (or tax year beginning in)  2012 2011	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions  470,327. 472,251.	ete this part structions before making an (c) Net value of noncharitable-use asso 9,809	ets 9,906.		(d) Distribution	ratio y column (c)) 0.047944 0.051081
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions  470,327.  472,251.  395,304.	ete this part structions before making an (c) Net value of noncharitable-use assi 9,809 9,249 9,348	ets 9,906. 5,102. 3,777.		(d) Distribution	ratio y column (c)) 0.047944 0.051081 0.042284
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009	y under section 4940(e) Do not complete each column for each year; see the installation (b) Adjusted qualifying distributions  470,327.  472,251.  395,304. 289,409.	ete this part structions before making an  (c) Net value of nonchantable-use asso  9,809  9,245  9,348  8,341	ets 9,906. 5,102. 3,777.		(d) Distribution	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions  470,327.  472,251.  395,304.	ete this part structions before making an  (c) Net value of nonchantable-use asso  9,809  9,245  9,348  8,341	ets 9,906. 5,102. 3,777.		(d) Distribution	ratio y column (c)) 0.047944 0.051081 0.042284
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)	y under section 4940(e) Do not complete each column for each year; see the installations  (b) Adjusted qualifying distributions  470,327. 472,251. 395,304. 289,409. 175,275.	ete this part structions before making an  (c)  Net value of nonchantable-use asso  9,800  9,245  9,348  8,341  7,399	y entries.  ets  9,906. 5,102. 3,777. 1,118. 9,343.		(d) Distribution	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions  470,327.  472,251.  395,304.  289,409.  175,275.	ete this part structions before making an  (c)  Net value of nonchantable-use asso  9,800  9,245  9,348  8,341  7,399	y entries.  ets  9,906. 5,102. 3,777. 1,118. 9,343.	(colu	(d) Distribution	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697 0.023688
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)  3 Average distribution ratio for the number of years the foundation	y under section 4940(e) Do not complete each column for each year; see the installations  (b) Adjusted qualifying distributions  470,327. 472,251. 395,304. 289,409. 175,275.	ete this part structions before making an  (c)  Net value of nonchantable-use asso  9,809  9,249  9,348  8,341  7,399  on line 2 by 5, or by the ars	ets 9,906. 5,102. 3,777. 1,118. 9,343.	(colu	Distribution mn (b) divided b	ratio ly column (c)) 0.047944 0.051081 0.042284 0.034697 0.023688 0.199694
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)  3 Average distribution ratio for the number of years the foundation  4 Enter the net value of noncharital	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions  470,327.  472,251.  395,304.  289,409.  175,275.	ete this part structions before making an  (c)  Net value of nonchantable-use asso  9,809  9,249  9,348  8,341  7,399  con line 2 by 5, or by the ars	ets 9,906. 5,102. 3,777. 1,118. 9,343.	(colu 2 3	Distribution mn (b) divided b	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697 0.023688 0.199694 0.039939
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)  3 Average distribution ratio for the number of years the foundation  4 Enter the net value of noncharitation  5 Multiply line 4 by line 3	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions  470,327.  472,251.  395,304.  289,409.  175,275.	ete this part structions before making an (c) Net value of nonchantable-use assistance (c) 9,809 9,249 9,348 8,349 7,399 con line 2 by 5, or by the ars	y entnes.  ets  9,906.  5,102.  3,777.  1,118.  9,343.	2 3	Distribution mn (b) divided b	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697 0.023688 0.199694 0.039939 0,686,164.
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)  3 Average distribution ratio for the number of years the foundation  4 Enter the net value of noncharitation  5 Multiply line 4 by line 3  6 Enter 1% of net investment inco	y under section 4940(e) Do not complete each column for each year; see the installation (b)  Adjusted qualifying distributions  470, 327.  472, 251.  395, 304.  289, 409.  175, 275.  25-year base period — divide the total of has been in existence if less than 5 years.	ete this part structions before making an (c) Net value of nonchantable-use associated as (c) 9,809 9,249 9,348 8,349 7,399 con line 2 by 5, or by the ars	y entnes.  ets  9,906. 5,102. 3,777. 1,118. 9,343.	2 3 4	Distribution mn (b) divided b	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697 0.023688 0.199694 0.039939 0,686,164. 426,795. 6,630.
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)  3 Average distribution ratio for the number of years the foundation  4 Enter the net value of noncharitation  5 Multiply line 4 by line 3  6 Enter 1% of net investment inco  7 Add lines 5 and 6	y under section 4940(e) Do not complete each column for each year; see the install the column for each year, and the column for each year, see the install the column for each year, and the column for each year, and the column for each year, see the install the column for each year, and the column for each year, see the install the column for each year, see the install the column for each year; see the install the column for each year, and the column for each year; see the install the column for each year.	ete this part structions before making an (c) Net value of nonchantable-use associated asociated associated associated associated associated associated as	y entries.  ets  9,906. 5,102. 3,777. 1,118. 9,343.	2 3 4 5	Distribution mn (b) divided b	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697 0.023688 0.199694 0.039939 0,686,164. 426,795.
If 'Yes,' the foundation does not qualify  1 Enter the appropriate amount in  Base period years Calendar year (or tax year beginning in)  2012 2011 2010 2009 2008  2 Total of line 1, column (d)  3 Average distribution ratio for the number of years the foundation  4 Enter the net value of noncharitation  5 Multiply line 4 by line 3  6 Enter 1% of net investment inco  7 Add lines 5 and 6	y under section 4940(e) Do not complete each column for each year; see the install the column for each year, and a see that it is a seen in existence if less than 5 year base penind — divide the total of has been in existence if less than 5 year base penind — divide the total of has been in existence if less than 5 year base penind — divide the total of has been in existence if less than 5 year base penind — divide the total of has been in existence if less than 5 year base penind — divide the total of has been in existence if less than 5 year.	ete this part structions before making an (c) Net value of nonchantable-use associated asociated associated associated associated associated associated as	y entnes.  ets  9,906. 5,102. 3,777. 1,118. 9,343.	2 3 4 5 6	Distribution mn (b) divided b	ratio y column (c)) 0.047944 0.051081 0.042284 0.034697 0.023688 0.199694 0.039939 0,686,164. 426,795. 6,630. 433,425.

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	990-PF (2013) Robert & Joyce Oberkotter Family Foundation  LVI : Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 -	82-05				P	age 4
		- see ir	nstru	Ction	s)		
٦а	Exempt operating foundations described in section 4940(d)(2), check here and enter 'N/A' on line 1						3z
•	Date of ruling or determination letter (attach copy of letter if necessary — see instrs)		.				
b	Domestic foundations that meet the section 4940(e) requirements in Part V,	·  -	1			6,6	30.
	check here .  All and enter 1% of Part I, line 27b	1	) ? \$		٨,	* 🏗	<i>a</i> . •
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			Chammada .			terrelities
	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			6,6	30.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	[	4				0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0		5			6,6	30.
6	Credits/Payments:		ìs	L	- 150 cm	<b>∀</b> γ.∦	<u>. T </u>
	2013 estimated tax pmts and 2012 overpayment credited to 2013	10.	"			* 7	( <b>3</b> %
	Exempt foreign organizations — tax withheld at source	,	,			,,	Ä
	Tax paid with application for extension of time to file (Form 8868) 6 c	$\neg$	,	<i>'</i>	300	•	v
	Backup withholding erroneously withheld	$\overline{}$	ı	,		*	
7	Total credits and payments. Add lines 6a through 6d		7			6,9	10.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here		8				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	<b>—</b>	9				
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	<u> </u>	10			2	80.
11	Enter the amount of line 10 to be Credited to 2014 estimated tax > 280 . Refunded		11				<del></del>
	t VII-A Statements Regarding Activities	<del></del>			-		
	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?				1 a	Yes	No X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?				1 b		Х
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials publi or distributed by the foundation in connection with the activities				*.}>		L. 3.".
d	Did the foundation file Form 1120-POL for this year?	• • • •	• •		1 c	.a. **	_X
_	(1) On the foundation * \$ (2) On foundation managers * \$  Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed or						. \$
-	foundation managers • \$	,			,3	1 1 1 1 1	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?				2		X
_	If 'Yes,' attach a detailed description of the activities						
_	,					á .	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If Yes,' attach a conformed copy of the changes				3		X
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?				4 a	-	X
	If 'Yes,' has it filed a tax return on Form 990-T for this year?				4 b		$\overline{}$
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?				5		Х
3	If 'Yes,' attach the statement required by General Instruction T		•			* .	
e	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either					Š	
6	, , , ,				, ,		
	By language in the governing instrument, or				<u>,</u> ,	: 4	
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that cor with the state law remain in the governing instrument?	ıflict			≟		<u> 289 J.</u>
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		• •		7	X	
•	The the real real of the action of the action of the action of the second of the secon					$\sim$	ı

BAA

NH - New Hampshire

Form 990-PF (2013)

8 b

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

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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If 'Yes,' complete Part XIV

**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* . . . . . . .

	n 990 <sub>1</sub> PF (2013) Robert & Joyce Oberkotter Family Foundation 82-057 rt VII-A   Statements Regarding Activities (continued)	7634	P	age 5
	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		х
12				х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address $\sim N/A$	13	Х	
14	The books are in care of ▶ Benjamin Chapman CPA Telephone no. ▶ (6)  Located at ▶ 97 Pleasant Street, Claremont, NH ZIP+4 ▶ 03743	03) 543	-007	3_
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here and enter the amount of tax-exempt interest received or accrued during the year	· <del>.</del>	. •	
16	At any time during calendar year 2013, 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?	16	Yes	No X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If 'Yes,' enter the name of the foreign country		ì	
Pa	rt 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):			
	<ul> <li>(1) Engage in the sale or exchange, or leasing of property with a disqualified person?</li></ul>	4.9	<b>3</b> .	* #
	disqualified person?	No 🎺		, 3 4
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	No 🔩 🗼	, ,	<b>%</b> .
	(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)?	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.)	No No	%° ;	* 1
1	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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here	r4 (	Marie,	
,	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 2013?	1 c	<u> </u>	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)):		\$-478 *	*
i	a 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?			*)
	If 'Yes,' list the years 20 , 20 , 20			Å 6
	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 instructions )	2b		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.		s*	
	► 20 _ , 20 _ , 20 _ , 20		,	¥.
		No	ì	
	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 penod (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		·% #
	determine in the realisation had exceeded admines includings in 2010 /	· · ·   30		

Form 990-PF (2013)

4 b

Form 990,PF (2013) Robert & Joyce Ober	kotter Family E	oundation	82-057	7634 Pa	age <b>6</b>
Part VII-B Statements Regarding Activiti		4720 May Be Req	uired (continued)		
5 a During the year did the foundation pay or incur at	· ·				*6
<ul><li>(1) Carry on propaganda, or otherwise attempt to</li><li>(2) Influence the outcome of any specific public to</li></ul>			· · · · · Yes X	No	*
on, directly or indirectly, any voter registration  (3) Provide a grant to an individual for travel, stu	n drive?`			No No	
(4) Provide a grant to an organization other than in section 509(a)(1), (2), or (3), or section 494	a chantable, etc. organiz	zation described		No O	
(5) Provide for any purpose other than religious, educational purposes, or for the prevention of	charitable, scientific, lite of cruelty to children or ar	rary, or nmals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of the described in Regulations section 53.4945 or in a (see instructions)?	current notice regarding	disaster assistance		5 b	
Organizations relying on a current notice regarding					
c If the answer is 'Yes' to question 5a(4), does the tax because it maintained expenditure responsible.	foundation claim exempt ility for the grant?	on from the	Yes	No S	
If 'Yes,' attach the statement required by Regulat	ions section 53 4945-5(d	").			,
6 a Did the foundation, during the year, receive any f on a personal benefit contract?				No Si	
b Did the foundation, during the year, pay premium If 'Yes' to 6b, file Form 8870.	is, directly or indirectly, o	n a personai benetit con	tract/	6 b	<u> </u>
7 a At any time during the tax year, was the foundation	on a party to a prohibited	tax shelter transaction?	Yes X	.         1	
b If 'Yes,' did the foundation receive any proceeds					
Part VIII Information About Officers, D					
and Contractors					
1 List all officers, directors, trustees, foundatio	<del>_</del>	· · · · · · · · · · · · · · · · · · ·	i		
(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 allowand	unt, ces
Anu Mullikin C/O Devine Millimet & Branch, PA PO Box 719 Manchester NH 03105	Secretary	0.	0.		0.
Robert McDevitt 267 Gilman Pond Road Newport, NH 03773	Treasurer	0.	0.		0.
Caryl McDevitt	1.00	<u> </u>	•		
267 Gilman Pond Road,	President				
Newport, NH 03773	1.00	0.	0.		0.
2 Compensation of five highest-paid employee	s (other than those inc	luded on line 1 – see i	nstructions). If none, e	nter '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 according other allowand	unt, ces
None					
				<del> </del>	
				ļ	
			1		
					-
Total number of other employees paid over \$50,000	<u> </u>	<u> </u>	<u> </u>	NT NT	lone
BAA	TEEA0306 07			Form 990-PF (2	

Form 990 <sub>e</sub> PF (2013) Robert & Joyce Oberkotter Family Foundation 82-	-0577	7634 Page <b>8</b>
Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign see instructions.)	n fou	ndations,
1 Fair market value of assets not used (or held for use) directly in carrying out chantable, etc, purposes a Average monthly fair market value of securities	1 a	10,514,729.
b Average of monthly cash balances	1 b	334,168.
C Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c) · · · · · · · · · · · · · · · · · ·	1 d	10,848,897.
e 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	
3 Subtract line 2 from line 1d	3	10,848,897.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3		· · · · · · · · · · · · · · · · · · ·
(for greater amount, see instructions)	4	162,733.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,686,164.
6 Minimum Investment return. Enter 5% of line 5	6	534,308.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating and certain foreign organizations check here	found	lations
1 Minimum investment return from Part X, line 6	1	534,308.
2 a Tax on investment income for 2013 from Part VI, line 5		
b Income tax for 2013 (This does not include the tax from Part VI.)		
C Add lines 2a and 2b	2 c	6,630.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	527,678.
4 Recoveries of amounts treated as qualifying distributions	4	<u> </u>
5 Add lines 3 and 4	5	527,678.
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	527,678.
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	1 a	539,654.
b Program-related investments – total from Part IX-B		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	3 2	

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

BAA

Form 990-PF (2013)

539,654.

533,024.

6,630.

3 b

4

5

6

## Part XIII Undistributed Income (see instructions)

•	(a) Corpus	(b) Years prior to 2012	<b>(c)</b> 2012	<b>(d)</b> 2013
1 Distributable amount for 2013 from Part XI, line 7 · · · · · · · · · · · · · · · · · ·	**************************************	* ` ` * * *	* * * * * *	527,678.
2 Undistributed income, if any, as of the end of 2013	3 , 1 3	* \$ .7 \$		<b>*</b>
a Enter amount for 2012 only	* *	4 <b>*</b> 1	395,298.	* * *
<b>b</b> Total for prior years 20 , 20 , 20	; ; , ; «			¥ , % / %
3 Excess distributions carryover, if any, to 2013	4 ×	* 8 %	, , , , , ,	« » · ·
a From 2008	,	.* 2,	, \ \ \ \	« )
<b>b</b> From 2009 0 .	* *		<i>,</i> ,	[ *
<b>c</b> From 2010 0 .			·	l
<b>d</b> From 2011 0 .		* *	4	
e From 2012 0 .	* 4 4' . 1	<u>.</u>		
f Total of lines 3a through e	0,	*		
4 Qualifying distributions for 2013 from Part	· · · · · · · · · · · · · · · · · · ·	*	•	
XII, line 4  \$ 539,654.	*: (2 ~ 4 ) \$# 3			*
a Applied to 2012, but not more than line 2a	. 47 1 1 1 1		395,298.	*
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions)				
•	* * * * * * * * * * * * * * * * * * * *	× ( ) « · ·	* *	. 4,2 /2 2
c Treated as distributions out of corpus (Election required — see instructions)		, , , , , , , , , , , , , , , , , , ,		
d Applied to 2013 distributable amount				144,356.
e Remaining amount distributed out of corpus	0.	*	* : .	
5 Excess distributions carryover applied to 2013		* * */* */*	* 1 4	
(If an amount appears in column (d), the	2,3 + 63 + 4	/	# · · · ·	×
same amount must be shown in column (a) )	\$ * * i		• \$	* **
6 Futuration and Artist at each columns	· % · % · %			* 4 2, 0 9 -
6 Enter the net total of each column as indicated below:		* 5		. > }
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			\ \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\
<b>b</b> Prior years' undistributed income. Subtract	j. 13 j.		<b>1</b>	
line 4b from line 2b	₹ <b>*</b>	0.	<u>*</u>	٤ ,
c Enter the amount of pnor years' undistribut-			٠.	* * * * * * * * * * * * * * * * * * *
ed income for which a notice of deficiency has been issued, or on which the section				. 10 3 4 1
4942(a) tax has been previously assessed			***	
d Subtract line 6c from line 6b. Taxable	* * * *		* * *	
amount – see instructions	:	0.	* / * * *	* * * * * * * * * * * * * * * * * * *
e Undistributed income for 2012 Subtract line 4a from				
line 2a Taxable amount — see instructions	\$ \$ \$ 6.3	*	0.	<u> </u>
f Undistributed income for 2013 Subtract lines	, (, 4) 1)	*		
4d and 5 from line 1. This amount must be	\$ <\$ 1 °	*, *		202 202
distributed in 2014		* * *	» <u>« , , , , , , , , , , , , , , , , , , </u>	383,322.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed		* * * * * * * *	* 30 * 10 .	, *
by section 170(b)(1)(F) or 4942(g)(3)		* * * * * * * *	* <2 * * ,	* *
(see instructions)			<b>*</b> ** ;	*
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	0.		* * /	\$
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.	*	* > <	*
10 Analysis of line 9.	Ŭ.			
a Excess from 2009 0 .				
b Excess from 2010 0.				
c Excess from 2011 0 .	1			
d Excess from 2012 0 .	1			
e Excess from 2013 · · 0 .	1			
	·	<del></del>	<del></del>	Farm 000 DE (2012)

Form 9	990-PF(2013) Robert & Joyce Obe	rkotter Fam:	ily Foundatio	n	82-0577634	Page 10
	XIV: Private Operating Foundati	<del></del>	N/A			
1al	f the foundation has received a ruling or dete s effective for 2013, enter the date of the rulir	rmınation letter that ıg	it is a private operat	ing foundation, and	the ruling · · · <u>··</u> · · · · · . ▶	
	Check box to indicate whether the foundation	is a private operati	ng foundation describ	bed in section	4942(j)(3) or	4942(j)(5)
2 a l	Enter the lesser of the adjusted net ncome from Part I or the minimum	Tax year		Pnor 3 years	,	
1	nvestment return from Part X for each year listed	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
	35% of line 2a					·
l	Qualifying distributions from Part XII, ine 4 for each year listed					
1	Amounts included in line 2c not used directly or active conduct of exempt activities					
1	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
	Complete 3a, b, or c for the alternative test relied upon.					
	Assets' alternative test — enter:		!			
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
- 1	Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, ine 6 for each year listed					
C	Support' alternative test — enter:					
ı	(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					
Part	(4) Gross investment income	(O l - 4 - 4  - i -		<u> </u>	d &E 000	•
Fait	Supplementary Information assets at any time during the	(Complete this e year — see in	structions.)	roundation nat	a \$5,000 or more	ın
а	Information Regarding Foundation Manag List any managers of the foundation who have close of any tax year (but only if they have co None	e contributed more	than 2% of the total of \$5,000) (See section	contributions receive on 507(d)(2))	ed by the foundation b	efore the
	List any managers of the foundation who own			ion (or an equally lai	ge portion of the own	ership of
	a partnership or other entity) of which the four None	ndation has a 10%	or greater interest.			
	None					
	Information Regarding Contribution, Gran Check here  □ if the foundation only ma requests for funds. If the foundation makes gromplete items 2a, b, c, and d.	kes contributions to fts, grants, etc (see	preselected charitate instructions) to indiv	ole organizations and viduals or organization	ons under other condit	
	The name, address, and telephone number of			ons should be addre	essed	
	Robert & Joyce Oberkotter I	Family Found	lation			
	P.O. Box 45	NH 0377	3 /60	3) 863-8088		
—	Newport The form in which applications should be sub					
	See attached					
	Any submission deadlines <sup>.</sup> Mid February See Attached					
d	Any restrictions or limitations on awards, such See attached list of eligib			elds, kinds of institu	tions, or other factors	

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient		16		Purpose of grant or contribution	Amount
Name and address (home or b	ousiness)	substantial contributor	recipient		
a Paid during the year  See Attached Sheets  See Attached Sheets  See Attached  Town of Unity School, N	NH 03743	None	n/a	College Scholarship	392,000.
Center Road Charlestown	NH 03603		n/a	School Improvement	100,000.
					492,000.
b Approved for future payment None None None	NH 03743		n/a	n/a	0.
Total		<u> </u>		► 3 b	0.

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

Enter arôss	amounts unless otherwise indicated.	Unrelate	ed business income	Exclude	d by section 512, 513, or 514	(-)
•		(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion	(d) Amount	(e) Related or exempt function income (See instructions)
	am service revenue			code		· · · · · · · · · · · · · · · · · · ·
a <u>Non</u>	<u>e</u>	999999	0.			
b						
g		-		ļ		·
e						<del>-</del>
· •	•					
n Fees	and contracts from government agencies			<del>                                     </del>		
_	pership dues and assessments			1		
	it on savings and temporary cash investments			<u> </u>		
	ends and interest from securities			<u> </u>		
5 Net re	ental income or (loss) from real estate	13 % . # 3 .	Ş., : & ' \ ,	(8).,	81 (111-21-3-1A)	
	financed property					
	ebt-financed property	•				
6 Net rei	ntal income or (loss) from personal property					
7 Other	investment income					
8 Gain o	r (loss) from sales of assets other than inventory					
9 Net ır	ncome or (loss) from special events					
10 Gross	s profit or (loss) from sales of inventory					
11 Other	revenue:	Tagle Hills,			12 - 15 12 13 13 13 13 13 13 13 13 13 13 13 13 13	
a Non	e	999999				
b				_		
С	•					
d						
е				ļ		
12 Subto	otal. Add columns (b), (d), and (e)	, , ,	0.			
	. Add line 12, columns (b), (d), and (e)				13	0.
See works	heet in line 13 instructions to verify calculations	s.)	·			
Part XVI	-B  Relationship of Activities to the	e Accomp	lishment of Exemp	ot Purj	poses	
Line No. ▼	Explain below how each activity for which inc accomplishment of the foundation's exempt p	ome is report ourposes (oth	ed in column (e) of Part er than by providing fund	XVI-A co	ontributed importantly to ch purposes). (See instr	the uctions.)
1	n/a					
			· ·=			
						<del></del>
						<del></del>
		<del></del>				

# Form 990-PF (2013) Robert & Joyce Oberkotter Family Foundation 82-0577634 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

								A 1	·   Yes	No
	rganization directly or I in section 501(c) of t									
	political organization			.(0)(0) 0.ga2a	ono, or m. c	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				
	from the reporting fo			, 5				<u> </u>		
									(1)	X
	r assets								(2)	X
<b>b</b> Other tran	-									\$1
	s of assets to a nonch	•	_					)———	) (1)	X
. ,	nases of assets from								(2)	X
• ,	al of facilities, equipm	•							(3)	X
	bursement arrangem							-	(4)	X
` ,	s or loan guarantees								(5)	Х
	rmance of services o		_						(6)	X
c Sharing o	f facilities, equipment	t, mailing lists,	other assets, or p	oald employees.				1 c	;	Х
d If the and	wer to any of the abo	vo in 'Voo ' oon	anlata tha fallowir	aa aabadula Cali	ımın (h) ohe	auld always ab	au tha fair ma	rkot volus	~£	
the goods	s, other assets, or ser action or sharing arra	vices given by	the reporting four	ndation. If the fou ne value of the go	ndation rec	ceived less that assets or serv	ow the fair mar in fair market v rices received	alue in	)I	
	(b) Amount involved		f noncharitable exem	• • • • • • • • • • • • • • • • • • • •			fers, transactions,		arrangemer	nts
(,	(0)	(0)			(-, -	, , , , , , , , , , , , , , , , , , ,		and onlaring		
				-						
				. ,						
				•						
									•	
					<del></del>		••			
2 a la tha fau	malatian almostly as in-	duna atti vaffili ata i	dth	<u> </u>						
described	ndation directly or inc d in section 501(c) of	the Code (othe	r than section 50	to, one or more to 1(c)(3)) or in sect	ion 527?	organizations		Г	Yes X	No
	omplete the following			· // //				_	] [	נ
(a)	Name of organization	1	<b>(b)</b> Type	of organization		(c)	Description of	relationshi	p	
				-			-		<del></del>	
Under pe	enalties of perjury, I declare t	that I have examine	d this return, including	accompanying schedul	es and statem	ents, and to the be	st of my knowledge	and belief, it is	true,	
/	and complete Declaration of	r preparer (other tha	n taxpayer) is based of	n all information of whic	n preparer ha	s any knowledge		- TV-	y the IRS dis	
Sign (	NUIUX >	be t		1		Treasur	$\sim$	this	s return with t	he
Here	11 sen	<u>~</u> /~_	<u> </u>	09/09/14	<u>Pr</u>	esident.		pre	parer shown e instructions	below ()2
	ure of officer or trustee Print/Type preparer's name		Dransade -	Date	Title	Date	1	1 10700	Yes	No
			Preparer's s			Date	_	If PTIN		
Paid	Benjamin Cha		Benja	u J Cliseps	(	09/15/14	self-employed	P01	221935	<u>;                                    </u>
Preparer			hapman, CPA	·/			Firm's EIN			
Use Only	i —		it Street							
	<u> </u>	laremont		<u></u>	IH 0374	13	Phone no (	60 <u>3)</u> 54		
BAA								Forr	ກ <b>990-PF</b>	(2013)

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	11,828.			11,828.
License & Fee	75.			75.
Miscellaneous	414.			414.

Total 12,317. 12,317.

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 Attorneys Auther Adams	Legal Maintenance Legal Maintenance	18,212. 5,625.			

Total <u>23,837.</u>

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

	End o	f Year
Line 10b - Investments - Corporate Stock:	Book Value	Fair Market Value
Wells Fargo Investment Account	11,138,606.	11,138,606.

Total <u>11,138,606.</u> <u>11,138,606.</u>

## Additional Information For Tax Return

# Robert & Joyce Oberkotter Family Foundation

82-0577634

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

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

# THE ROBERT AND JOYCE OBERKOTTER FAMILY FOUNDATION

# APPLICATION FOR SCHOLARSHIP

l.	Name
2.	Address
3.	City/State/Zip
4.	Home Telephone Number
5.	Cell Telephone Number
6.	Email
7.	Date of Birth
<del>-</del> 8.	School Presently Attending
9.	Please list the post-secondary schools that you have applied to or intend to apply to for admission in 2014:
	First Choice
	Second Choice
	Third Choice
10.	What is your intended major or course of study?
11.	On a <u>separate</u> , <u>single</u> , <u>typewritten 8 ½" x 11"</u> sheet, please list and describe the following information (as applicable) in the following order:
	a. School activities (sports, clubs, offices, awards and other extra-curricular activities)
	b. Community activities with which you have been involved
	c. Employment history
	d. Noteworthy service to school or family

- 12. 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, 2014.
  - B. Two letters of recommendation.
  - 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 must be <u>received</u> by the Foundation no later than February 1, 2014. Incomplete or late submissions shall not be considered by the Foundation. Please refer to the Robert and Joyce Oberkotter Family Foundation Criteria/Requirements for detailed and specific requirement for the timely submission of all application materials.

Submissions must include four (4) copies of the fully completed application and four (4) copies of all of the items required in number 12 above. Please collate each set such that the application and attachments are on top, followed by the additional items required in number 12 above, in the order listed above. The sets will be distributed to each Director of the Foundation for review. Please mail all four (4) collated, complete sets of application material in one (1) single envelope.

All submissions must be made to the following address:

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

Please note that emailed or faxed application materials, incomplete applications and applications with less than four (4) complete, collated sets of application materials will not be considered.

Questions regarding this scholarship should be directed to your high school guidance/college counselor or you may email your questions to <a href="mailto:inquiries@oberkotterfamilyfoundation.org">inquiries@oberkotterfamilyfoundation.org</a>.

C \Users\Ben\Downloads\2013-2014 Scholarship Application (M2474593x9DD8D) doc

## 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) Sunapee High 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, 2014 and to enroll in a post-secondary educational institution in the fall of 2014, and must provide a transcript or other official high school document evidencing anticipated graduation by June 30, 2014.

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 2014.

#### 3. Deadline For Submission

Completed applications must be <u>received</u> by the Foundation no later than February 1. 2014. The Foundation cannot be responsible for incomplete or late submissions. Completed applications should be <u>mailed only</u> to the following address:

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

Emailed or faxed applications will not be accepted.

#### 4. Application Components

- (a) <u>Application</u>: Each applicant must complete the attached application in full. All applications must be <u>typed</u>. 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 in school, 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) <u>Narrative Essay</u>: Together with the completed application and the two letters of recommendation, each applicant shall submit a <u>typewritten</u> narrative essay on one of the following topics: (i) Should there be an upper or lower age restriction for elected officials? (ii) Select a charity or a charitable cause and explain why you would solicit funds for the organization/cause and how you would persuade people to donate to this organization/cause; (iii) Describe how to make a paper airplane (iv) If you could go back in time and change one historical (not personal) event, which one would you choose, why and what effect do you think the change would have?

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) Official School Transcript: Submit an official high school transcript or other official high school document evidencing anticipated graduation by June 30, 2014.

#### 5. Application Procedures

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, <u>collated in that order</u>. 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.

Please carefully note the following:

- Incomplete applications will not be considered
- The components of the application must be mailed together (4 sets); components, such as recommendations or transcripts, mailed separately to the Foundation will not be considered and will render the application incomplete
- Submissions that do not include 4 complete, collated sets of application materials
  will deemed incomplete and will not be considered each collated set is given
  directly to a foundation director for review; the Foundation shall not be
  responsible for photocopying or collating application material to be provided to
  the directors
- Submissions <u>received</u> after February 1, 2014 will not be considered regardless of post-mark or mailing date; applicants may not satisfy the due date requirement by emailing or faxing the application or any components of the application; please plan accordingly four collated, complete sets of applications materials in one envelope must be in the Foundation's mailbox on or before February 1, 2014
- Be sure to provide current contact information in case the directors have any questions while reviewing your application; preference is email or local cell or home telephone number; please provide (i) a valid and regularly checked email address and/or (ii) a regularly checked telephone or cell phone number with voice mail
- Any inquiries or other correspondence regarding the scholarship or application procedures must come <u>from the applicant only</u>, not from the applicant's parents; direct inquiries to <u>inquiries@oberkotterfamilyfoundation.org</u>; please allow five business days for your inquiry to be answered, and <u>please follow up</u> if you do not hear back within five business days
- Please make it easy for the directors to consider you application on its merits by following all the application procedures precisely

#### 6. Scholarship Award

The Foundation intends to award scholarships in the amount of \$3,500 each to one or more students from each of the eligible high schools based on the quality of the applications. Applicants who are awarded scholarships in the spring of 2014 will be eligible to reapply to receive further scholarship funding each year that they are enrolled in college and./or graduate or professional school.

Scholarship awards will be made directly to the institution in which the recipient enrolls for the fall, 2014 term. Scholarship recipients will be required to provide a mailing address for the bursar's office of the college in which they are enrolling. In the event that any scholarship recipient does not provide adequate evidence of enrollment for the fall, 2014 term, or provide mailing information for the school by the due date indicated in the scholarship award letter, the scholarship to that recipient may be revoked at the election of the Foundation.

Scholarship applicants and their high schools will be notified about scholarship award decisions on or about April 20, 2014. Please do not contact the Foundation regarding the status of your application unless you have not received a letter from the Foundation by April 20, 2014.

Recipient Name & Address	If recipient is an individual show any relationship to any foundation manager or substantial contributor	Foundation status of the recipient	Purpose of grant or contribution	Person or Business checkbox and amount
Bethany Adam 12 Blain Road Canaan, NH 03741	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Jennifer Arnold PO Box 1375, 35 Clearwater Drive Grantham, NH 03753	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Bridgette Aumand 251 Upper Walpole Road Walpole, NH 03608	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Emma Sophia Boa 507 Pratt Road Alstead, NH 03602	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Matthew Blaise Bocko 21 Summit Road Newport, NH 03773	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Spencer Bogar 285 Old Keene Road Walpole, NH 03608	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Stephanie Bonewald PO Box 1085, 948 Andover Road New London, NH 03257	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Alexandra Brady PO Box 669 Block Island, RI 02807	None	N/A	College Scholarship	Person ⊠ Business □ \$3500
Sarah Burgess 25 Seniors Way White River Junction, VT 05001	None	N/A	College Scholarship	Person ⊠ Business □ \$3500

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Anna Buckley Cahill				Person 🖾
47 Ridge Road	None	N/A	College	Business
New London, NH 03257			Scholarship	\$3500
Kendra Campbell				Person 🗵
23 Cheney Street	None	N/A	College	Business
Newport, NH 03773			Scholarship	\$3500
Alana Cannistraci				Person 🗵
900 S. Olive Avenue, Box #180	None	N/A	College	Business
West Palm Beach, FL 33401			Scholarship	\$3500
Nichlas A. Cannistraci				Person 🗵
68 Andover Street	None	N/A	College	Business
Ludlow, VT 05149			Scholarship	\$3500
Emma Carlson				Person 🗵
94 Meadow Drive	None	N/A	College	Business
Danville, VT 05828			Scholarship	\$3500
Ellissa Kate Coburn				Person 🖾
10 Tutherly Ave.	None	N/A	College	Business
Claremont, NH 03743			Scholarship	\$3500
Tegan Coley				Person 🔯
PO Box 356	None	N/A	College	Business
Hartland, VT 05048			Scholarship	\$3500
Howell Thomas Conant III				Person 🖾
PO Box 1256	None	N/A	College	Business
Block Island, RI 02807			Scholarship	\$3500
Aaron Crosby				Person 🔯
4637 Sansom Street 1st Floor	None	N/A	College	Business
Philadelphia, PA 19139			Scholarship	\$3500
Elizabeth Cubberley				Person 🕅
PO Box 65	None	N/A	College	Business
South Acworth, NH 03607			Scholarship	\$3500

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Cassondra Noelle Dale				Person 🖾
1 Edwin Avenue	None	N/A	College	Business
Claremont, NH 03743			Scholarship	\$3500
Isaac Colin Dayno				Person 🖾
91 Burnham Road	None	N/A	College	Business
East Thetford, VT 05043			Scholarship	\$3500
Nicole DeBalsi				Person 🖾
315 Fernwood Farms Rd	None	N/A	College	Business
Canaan, NH 03741			Scholarship	\$3500
Jenna Deschaine				Person 🖾
1 Fenway Lane	None	N/A	College	Business
Claremont, NH 03743			Scholarship	\$3500
Megan Leigh Deschaine				Person 🖾
1 Fenway Lane	None	N/A	College	Business
Claremont, NH 03743			Scholarship	\$3500
Ethan Dickinson				Person 🖾
PO Box 235	None	N/A	College	Business
Enfield, NH 03748			Scholarship	\$3500
Richard Dillehay				Person 🖾
1009 Hinman Dartmouth College	None	N/A	College	Business
Hanover, NH 03755			Scholarship	\$3500
Katherine Elizabeth Doyle				Person 🖾
1507 County Road	None	N/A	College	Business
Walpole, NH 03608			Scholarship	\$3500
Adam, Dutille				Person 🖾
19 Hawley Drive	None	N/A	College	Business
Enfield, NH 03748			Scholarship	\$3500
Jessica Eaton				Person 🖾
74 Church Street	None	N/A	College	Business
Claremont, NH 03743			Scholarship	¢3500

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Rachel A. Eaton				Person
175 Beacon Street Apt 309	None	N/A	College	S
Somerville, MA 02143		:	Scholarship	0
Kelly Fayton				Person 🕅
16 Lake Avenue	None	A/A	College	Business
Newbury, NH 03255			Scholarship	\$3500
Kari Fillian				Person 🖾
25 Union Street	None	N/A	College	Business
Windsor, VT 05089			Scholarship	\$3500
Garrett Fontaine				Person 🔯
23 Grandview Avenue	None	N/A	College	Business
Lebanon, NH 03766			Scholarship	\$3500
Elizabeth Ann Forrest				Person 🖾
10 West Street	None	A/N	College	Business
North Walpole, NH 03609			Scholarship	\$3500
Nathan Aaron French				Person 🔯
181 Plains Road	None	N/A	College	Business
Andover, NH 03216			Scholarship	\$3500
Nathaniel George Furman				Person 🖾
918 Rush Meadow Road	None	N/A	College	Business
Reading, VT 05062			Scholarship	\$3500
Noah Littlefield Gasner				Person 🔯
PO Box 315	None	N/A	College	Business
Block Island, RI 02807	!		Scholarship	\$3500
Lucas Gerow				Person 🖾
295 Meridan Road	None	N/A	College	Business
Lebanon, NH 03766			Scholarship	\$3500
Emily Goss				Person 🖾
PO Box 154, 120 Sholes Roas Extension Goshen, NH 03752	None	A/N	College Scholarship	Business 🗆
				DOCC C

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lan Gregory-Davis				Person
5 Mitchell Drive	None	N/A	College	Business
Meriden, NH 03770			Scholarship	0
Nicholas Hanslin de Sherbinin				Person 🖾
PO Box 1462	None	N/A	College	Business
Grantham, NH 03753			Scholarship	\$3500
Sonja Hansson				Person 🖾
278 March Hill Road	None	N/A	College	Business
Walpole, NH 03608			Scholarship	\$3500
William Steven Henriques				Person 🖾
PO Box 129, 219 Main Street	None	N/A	College	Business
Andover, NH 03216			Scholarship	\$3500
Ryan Shawn Herman				Person 🖾
S Mill Pond Road	None	N/A	College	Business
Nelson, NH 03457			Scholarship	\$3500
Martha Howe				Person 🖾
3 Brennan Circle Box 219	None	N/A	College	Business
Poultney, VT 05764			Scholarship	\$3500
Darien Hubert				Person 🖾
179 Springfield Road	None	N/A	College	Business
Newport, NH 03773			Scholarship	\$3500
Sage Hubert				Person 🖾
179 Springfield Road	None	N/A	College	Business
Newport, NH 03773			Scholarship	\$3500
Amina Hughes				Person 🖾
GSS Box 7399	None	N/A	College	Business
Durham, NH 03824			Scholarship	\$3500
Autumn Kariuki				Person 🖾
266 Westwood Road	None	N/A	College	Business
Stamford, CT 06902			Scholarship	\$3500

Labor Daniella Varia				ļ
חמובל חמוופונפ עמון			=	Person 🖄
51 Mascoma Street	None	N/A	College	Business
Lebanon, NH 03766			Scholarship	\$3500
Hye Sung Kim				Person 🖾
3510 N. Charles Street, AMR II #2440	None	N/A	College	Business
Baltimore, MD 21218			Scholarship	0
Kaitlyn R. Klema				Person 🖾
296 Main Street, PO Box 77	None	N/A	College	Business
Charlestown, NH 03603			Scholarship	\$3500
Katja Kleyensteuber				Person 🖾
24 Princeton Street	None	N/A	College	Business
Claremont, NH 03743	!	1	Scholarship	\$3500
Madison Koenig				Person 🖾
272 Shindagan Road	None	N/A	College	Business
Wilmot, NH 03287		:	Scholarship	\$3500
Kellee Anne Kosiorek				Person 🖾
929 Lockehaven Road	None	N/A	College	Business
Enfield, NH 03748			Scholarship	\$3500
Kevin Edward Kosiorek				Person 🖾
929 Lockehaven Road	None	N/A	College	Business
Enfield, NH 03748			Scholarship	\$3500
Kori Kosiorek				Person 🖾
929 Lockehaven Road	None	N/A	College	Business
Enfield, NH 03748			Scholarship	0
Kyle Kosiorek				Person 🔯
929 Lockehaven Road	None	N/A	College	Business
Enfield, NH 03748			Scholarship	\$3500
Ingrid Kottke				Person 🖾
33 Perley Avenue	None	N/A	College	Business
Lebanon, NH 03766			Scholarship	\$3500

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N/A N/A N/A N/A N/A N/A N/A N/A				
None N/A N/A None N/A	<u> </u>			Person 🔯
bus Center None N/A	None	N/A	College	Business
pus Center None N/A			Scholarship	\$3500
bus Center None N/A				Person 🖾
bus Center  None  None  None  None  None  None  None  None  NA  NA  NA  NA  NA  NA  NA  NA  NA	None	N/A	College	Business
pus Center None N/A			Scholarship	\$3500
bus Center None N/A  None N/A  None N/A  None N/A  None N/A  N/A  None N/A				Person 🖾
None None N/A None N/A None N/A N/A None N/A N/A None N/A None N/A N/A	None	N/A	College	Business
None N/A			Scholarship	\$3500
None N/A				
None N/A				Person 🔯
	None	N/A	College	Business
73 73 74 75 75 8743 8743 8743 8743 8743 8743 8743 8743			Scholarship	\$3500
73 h None N/A None N/A 3743 None None N/A None N/A N/A				Person 🗵
73  None N/A None N/A 3743 None None N/A None N/A	None	N/A	College	Business
1 None N/A			Scholarship	\$3500
1 None N/A		:	1	Person 🖾
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In None N/A 3743  Aattice None N/A 3743  None N/A			Scholarship	\$3500
3743  None  None  None  None  N/A  None  N/A				Person 🗵
3743  None  None  None  N/A	None	N/A	College	Business
Aattice None N/A 3743 None N/A			Scholarship	\$3500
3743 None N/A None N/A				Person 🖾
3743 None N/A	None	N/A	College	Business
None N/A			Scholarship	\$3500
None N/A				Person 🗵
	None	N/A	College	Business
Block Island, RI 02807			Scholarship	\$3500
^				Person 🖾
None N/A	None	N/A	College	Business
Newport, NH 03773			Scholarship	\$3500

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Megan Mary Mitchell			;	Person 🗵
Two College Street Box 1372	None	N/A	College	Business
Providence, RI 02903		!	Scholarship	\$3500
Emily Morison				Person 🖾
PO Box 56	None	N/A	College	Business
Andover, NH 03216			Scholarship	\$3500
Sage, Morison				Person 🖾
PO Box 56	None	N/A	College	Business
Andover, NH 03216			Scholarship	\$3500
Christopher Thomas Morse				Person 🖾
PO Box 206605	None	N/A	College	Business
New Haven, CT 06520-6605			Scholarship	\$3500
Oliver Mott				Person 🖾
PO Box 855	None	N/A	College	Business
Block Island, RI 02807			Scholarship	\$3500
Elijah Nelson				Person 🖾
236 Mountain Road	None	N/A	College	Business
Newbury, NH 03255			Scholarship	\$3500
Mıriam Nelson				Person 🖾
236 Mountain Road	None	N/A	College	Business
Newbury, NH 03255			Scholarship	\$3500
Rachel Nelson			:	Person 🖾
4 Marquis Avenue	None	N/A	College	Business
Claremont, NH 03743			Scholarship	\$3500
Klare Brigham Nevins				Person 🖾
433 Burnt Hill Road	None	N/A	College	Business
Warner, NH 03278			Scholarship	\$3500
Johan (Carter) Noordsij				Person 🗵
PO Box 1909, 104 Oakmont Road	None	N/A	College	Business
New London, NH 03257			scholarship	\$3500

F 1 1 4

Cody Patch				Person
33 Walhowdon Way	None	N/A	College	v
Lebanon, NH 03766			Scholarship	0
Brian T. Perry				Person 🖾
270 Old Cheshire Turnpike	None	N/A	College	Business
Walpole, NH 03608			Scholarship	\$3500
Samantha Perry				Person 🖾
1000 Holt Avenue - 1548	None	N/A	College	Business
Winter Park, FL 32789			Scholarship	\$3500
Nicholas Joseph Petersen				Person 🖾
GCC Box #1609, 200 Campus Drive	None	N/A	College	Business
Grove City, PA 16127			Scholarship	\$3500
Shelby L. Pillsbury				Person 🖾
7 Madison Place	None	N/A	College	Business
Claremont, NH 03743			Scholarship	\$3500
Victoria Florio Pipas				Person 🖾
28 Loomis Road	None	N/A	College	Business
Lebanon, NH 03766			Scholarship	\$3500
Madison Henry Powers				Person 🖾
Box S4739	None	N/A	College	Business
Hamilton, NY 13346			Scholarship	\$3500
Jingya Qiu				Person 🖾
21 Pinnero Hill Road	None	N/A	College	Business
Hanover, NH 03755			Scholarship	\$3500
Abigail C. Rienzo				Person 🖾
209 Prescott Hill Road	None	N/A	College	Business
Grafton, NH 03240			Scholarship	\$3500
Taylor Rocke				Person 🖾
368 Unity Stage Road #1	None	N/A	College	Business
Charlestown, NH 03603			scnolarsnip	\$3500

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 $\boxtimes \Box$ 図口 \$3500 \$3500 \$3500 \$3500 \$3500 \$3500 \$3500 \$3500 \$3500 \$3500 Business Person Scholarship College N/A N/A N/A N/A N/A N/A N/A N/A N/A A/N None Brendan Walter Gybbon (Gyb) Spilsbury Apartment #6 701 W. 32nd Street Winthrop Irving Townsend IV PO Box 571, 43 Paris Avenue North Windsor, VT 05089 Charlestown, NH 03603 1183 Washington Road Saint Francis, SD 57572 Los Angeles, CA 90007 Claremont, NH 03743 Newport, NH 03773 Newport, NH 03773 Newport, NH 03773 Lebanon, NH 03766 568 Sunapee Street 568 Sunapee Street 97 Wellingon Circle 190 Summer Street Goshen, NH 03752 Nicholas Sullivan **1823 US Route 5** 4 Hemlock Road Parker Sorenson Hannah St. Jean Mark White Hat Matthew Tufts Sharissa Stout Julia Sullivan Molly White PO Box 168

Cara Wolf				Person 🗵
PO Box 1975	None	N/A	College	Business
New London, NH 03257			Scholarship	\$3500
Danielle June Woodward				Person 🖾
5 Payne Road, Box 1478	None	N/A	College	Business
Block Island, RI 02807			Scholarship	\$3500
Fan (Louise) Zhang				Person 🖾
7 Campus Drive, Kimball Union Academy	None	N/A	College	Business
Meriden, NH 03770			Scholarship	\$3500