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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

Name of foundation
PETERS FAMILY FOUNDATION

A Employer identification number
43-1958273

Number and street (or P O box number if mail is not delivered to street address) PO BOX 3208 | Room/suite

B Telephone number (see instructions)

City or town, state or province, country, and ZIP or foreign postal code
PARK CITY, UT 84060

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 1,555,275

J Accounting method ☑ Cash ☐ Accrual ☐ Other (specify) ____ *(Part I, column (d) must be on cash basis.)*

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	8	8		
	4	Dividends and interest from securities	38,414	38,414		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	308,443			
	b	Gross sales price for all assets on line 6a 1,059,551				
	7	Capital gain net income (from Part IV, line 2)		314,670		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	346,865	353,092		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	1,300	1,300		
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)				
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	6,063	6,063		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	7,363	7,363		0
	25	Contributions, gifts, grants paid	75,025			75,025
	26	**Total expenses and disbursements.** Add lines 24 and 25	82,388	7,363		75,025
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	264,477			
	b	**Net investment income** (if negative, enter -0-)		345,729		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	743,876	-29,647	-29,647
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	509,672	1,073,513	1,063,955
	c	Investments—corporate bonds (attach schedule)	50,624	524,785	520,967
	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 ▶ 16,442			
		Less accumulated depreciation (attach schedule) ▶ 16,442			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	1,304,172	1,568,651	1,555,275
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)		0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds	1,304,172	1,568,651	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	1,304,172	1,568,651	
	31	**Total liabilities and net assets/fund balances** (see instructions)	1,304,172	1,568,651	

Part III **Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,304,172
2	Enter amount from Part I, line 27a	2	264,477
3	Other increases not included in line 2 (itemize) ▶	3	148
4	Add lines 1, 2, and 3	4	1,568,797
5	Decreases not included in line 2 (itemize) ▶	5	146
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,568,651

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	314,670
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	260,794

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	76,175	1,529,016	0 049820
2012	74,986	1,517,721	0 049407
2011	74,750	1,574,361	0 047480
2010	72,500	1,440,821	0 050319
2009	74,809	1,374,518	0 054426

2	**Total** of line 1, column (d)	2	0 251452
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 050290
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	1,565,737
5	Multiply line 4 by line 3	5	78,741
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,457
7	Add lines 5 and 6	7	82,198
8	Enter qualifying distributions from Part XII, line 4	8	75,025

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	6,915
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	6,915
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	6,915
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — 6a: 176		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 6,739		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	6,915
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
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 2015 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
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 ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
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		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ ________			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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

			Yes	No
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		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶DAVID PETERS Telephone no ▶(435) 658-2727

Located at ▶PO BOX 3208 PARK CITY UT ZIP+4 ▶84060

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 2014, 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		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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? ☐ **Yes** ☑ **No**			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ **Yes** ☑ **No**			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ **Yes** ☑ **No**			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ **Yes** ☑ **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)? ☐ **Yes** ☑ **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). ☐ **Yes** ☑ **No**			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2014?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ **Yes** ☑ **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		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ **Yes** ☑ **No**			
b	If "Yes," did it have excess business holdings in 2014 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 2014.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2014?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
ANN PETERS PO BOX 3208 PARK CITY, UT 84060	TRUSTEE 0 25	0	0	0
DAVID W PETERS PO BOX 3208 PARK CITY, UT 84060	TRUSTEE 0 25	0	0	0
SUSAN PETERS PO BOX 3208 PARK CITY, UT 84060	TRUSTEE 0 25	0	0	0

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

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	1,417,928
b	Average of monthly cash balances	1b	171,653
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	1,589,581
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,589,581
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	23,844
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,565,737
6	**Minimum investment return.** Enter 5% of line 5	6	78,287

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6			1	78,287
2a	Tax on investment income for 2014 from Part VI, line 5	2a	6,915		
b	Income tax for 2014 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	6,915
3	Distributable amount before adjustments Subtract line 2c from line 1			3	71,372
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	71,372
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	71,372

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	75,025
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		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	75,025
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	75,025

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

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7					71,372
2 Undistributed income, if any, as of the end of 2014					
a Enter amount for 2013 only.					
b Total for prior years 20___, 20___, 20___					
3 Excess distributions carryover, if any, to 2014					
a From 2009.					
b From 2010.	31				
c From 2011.					
d From 2012.					
e From 2013.					
f Total of lines 3a through e.		31			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ $ 75,025					
a Applied to 2013, but not more than line 2a					
b Applied to undistributed income of prior years (Election required—see instructions).					
c Treated as distributions out of corpus (Election required—see instructions).					
d Applied to 2014 distributable amount.					71,372
e Remaining amount distributed out of corpus		3,653			
5 Excess distributions carryover applied to 2014 *(If an amount appears in column (d), the same amount must be shown in column (a).)*					
6 Enter the net total of each column as indicated below:					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		3,684			
b Prior years' undistributed income Subtract line 4b from line 2b					
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.					
d Subtract line 6c from line 6b Taxable amount —see instructions					
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions					
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)					
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . .					
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a		3,684			
10 Analysis of line 9					
a Excess from 2010. . . .	31				
b Excess from 2011. . . .					
c Excess from 2012. . . .					
d Excess from 2013. . . .					
e Excess from 2014. . . .	3,653				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling. . . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	**(b)** 2013	**(c)** 2012	**(d)** 2011	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon **a** "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

See Additional Data Table

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
See Additional Data Table				
Total . . . . ▶ **3a**				75,025
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	8	
4 Dividends and interest from securities. . . .			14	38,414	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	313,931	-5,488
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				352,353	-5,488

13 Total. Add line 12, columns (b), (d), and (e). **13** 346,865

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	**1a(1)**		**No**
(2) Other assets.	**1a(2)**		**No**
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		**No**
(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		**No**
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		**No**
(4) Reimbursement arrangements.	**1b(4)**		**No**
(5) Loans or loan guarantees.	**1b(5)**		**No**
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		**No**
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		**No**

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?. ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	**(b)** Type of organization	**(c)** Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

****** | 2015-04-28 | ******

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ **Yes** ☐ **No**

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
JAMES R BEAUDOIN		2015-05-21		P00013299

Firm's name ▶ PINNOCK ROBBINS POSEY & RICHINS PC — Firm's EIN ▶ 87-0381988

Firm's address ▶ 215 S STATE ST STE 850 SALT LAKE CITY, UT 841112380 — Phone no (801) 533-0409

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
BLDRS EMERGING MKTS 50 ADR INDEX	P	2012-04-18	2014-03-24
ISHARES RUSSELL 2000 ETF	P	2012-04-18	2014-03-24
POWERSHARES DB COMMODITY INDEX TRACK	P	2011-06-29	2014-03-24
RYDEX ETF TRUST GEGGENHEIM S&P 500 E	P	2012-04-18	2014-03-24
BLDRS EMERGING MKTS 50 ADR INDEX	P	2014-01-01	2014-03-24
ISHARES RUSSELL 2000 ETF	P	2014-01-01	2014-03-24
ISHARES TIPS BOND ETF	P	2014-01-01	2014-03-24
POWERSHARES DB COMMODITY INDEX	P	2014-01-01	2014-03-24
POWERSHARES QQQ TR UNIT SER 1	P	2014-01-01	2014-03-24
RYDEX ETF TRUST GUGGENHEIM S&P 500	P	2014-01-01	2014-03-24

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
8,709		10,311	-1,602
17,507		12,061	5,446
5,169		5,864	-695
10,839		7,665	3,174
36,922		47,894	-10,972
82,865		36,182	46,683
15,674		15,194	480
58,537		51,758	6,779
177,933		64,737	113,196
166,556		101,089	65,467

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-1,602
			5,446
			-695
			3,174
			-10,972
			46,683
			480
			6,779
			113,196
			65,467

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
VANGUARD INDEX FDS VANGUARD REIT	P	2014-01-01	2014-03-24
VANGUARD INTL EQUITY INDEX	P	2014-01-01	2014-03-24
FIDELITY-2900 ST COVERED	P	2014-01-01	2014-12-31
MANAGERS PINCO BOND FUND	P	2013-01-01	2014-03-26
METROPOLITAN WEST HIGH YIELD BOND	P	2014-01-01	2014-03-26

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
120,969		85,782	35,187
68,779		65,064	3,715
193,158		193,040	118
6,511		6,672	-161
7,658		7,517	141

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			35,187
			3,715
			118
			-161
			141

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000).

ANN PETERS
DAVID W PETERS
SUSAN PETERS

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ARTEEAST 1178 BROADWAY 3RD FLOOR NEW YORK, NY 10003	BOARD MEMBER	501(C)(3)	SUPPORT ORG CHARITABLE PURPOSE	3,500
CHOICE HUMANITARIAN 7879 SOUTH 1530 WEST SUITE 200 WEST JORDAN, UT 84088	NONE	501(C)(3)	ASSIST OF IMPOVERISHED PEOPLE	31,075
COALITION FOR THE HOMELESS 1129 FULTON STREET NEW YORK, NY 10038	NONE	501(C)(3)	PROVIDE FOOD, JOB TRAINING, PROGRAMS	5,000
EQUAL JUSTICE INITIATIVE 112 COMMERCE ST MONTGOMERY, AL 36104	NONE	501(C)(3)	PROVIDE LEGAL REPR TO DEFENDANTS	6,000
IRAQAFGHAN VETERANS OF AMERICA 292 MADISON AVE 10TH FL NEW YORK, NY 10017	NONE	501(C)(3)	SUPPORT ORG CHARITABLE PURPOSE	1,500
LAKE WINNEBAGO QUALITY IMPROV ATTN ELLEN BALTHAZOR PO BOX 1716 FOND DU LAC, WI 54936	NONE	501(C)(3)	IMPROVE WATER QUALITY OF LAKE WINNEB	1,650
NAT ALLIANCE ON MENTAL ILLNESS 3803 N FAIRFAX DRIVE ARLINGTON, VA 22203	NONE	501(C)(3)	SUPPORT ORG CHARITABLE PURPOSE	6,500
PARK CITY EDUCATION FOUNDATION PO BOX 681422 PARK CITY, UT 84068	NONE	501(C)(3)	SUPPORT PROGRAMS THAT ADVANCE EDUC	1,000
THE NATURE CONSERVANCY 4245 N FAIRFAX DR SUITE 100 ARLINGTON, VA 22203	NONE	501(C)(3)	PRSRVTN OF CRITICAL LANDS AND WATER	6,150
WISC CTR FOR INVST JOURNALISM 821 UNIVERSITY AVENUE MADISON, WI 53706	NONE	501(C)(3)	SUPPORT ORG CHARITABLE PURPOSE	4,000
WORLD FOOD PROGRAM 1819 L STREET NW SUITE 900 WASHINGTON DC, DC 20036	NONE	501(C)(3)	FOOD ASSISTANCE IN DEV COUNTRIES	8,650
Total . . . . ▶ **3a**				75,025

TY 2014 Accounting Fees Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INDIRECT ACCOUNTING FEES	1,300	1,300		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
ORGANIZATION COSTS	2002-07-03	16,442	16,442	S/L	5 0000				

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Gain/Loss from Sale of Other Assets Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
TAX BASIS ADJUSTMENT	2011-06	PURCHASE	2014-03			5,802			-5,802	
WASH SALE	2014-01	PURCHASE	2014-12		126				126	
MANAGERS PIMCO BOND FUND	2013-01	PURCHASE	2014-03		8,725	8,708			17	
METROPOLITAN WEST HIGH YIELD BOND	2013-01	PURCHASE	2014-03		24,887	25,347			-460	
POWERSHARES K-1 LINE 8	2014-01	PURCHASE	2014-12			75			-75	
POWERSHARES K-1 LINE 9A	2013-01	PURCHASE	2014-12			346			-346	
POWERSHARES K-1 LINE 11C	2014-01	PURCHASE	2014-12		125				125	
POWERSHARES K-1 LINE 11C	2013-01	PURCHASE	2014-12		188				188	

TY 2014 Investments Corporate Bonds Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Name of Bond	End of Year Book Value	End of Year Fair Market Value
METROPOLITAN WEST HY BOND		
MANAGERS PIMCO BOND FUND		
FIDELITY TOTAL BOND	100,857	101,650
STRATEGIC ADVISERS SHORT DURATION FD	80,435	80,034
STRATEGIC ADVISERS INCOME OPP	60,795	57,039
STRATEGIC ADVISERS CORE INCOME FD	188,037	189,418
PIMCO TOTAL RETURN ADMINISTRATIVE	69,837	68,984
TEMPLETON GLOBAL BOND CLASS A	24,824	23,842

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491141002565

TY 2014 Investments Corporate Stock Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Name of Stock	End of Year Book Value	End of Year Fair Market Value
POWERSHARES QQQ TR UNIT		
TR RUSSELL 2000 INDEX FUND		
BLDRS EMERGING MKTS 50 ADR		
ISHARES BARCLAYS TREA		
RYDEX ETF TR S&P 500		
POWERSHARES DB COMMODITY INDX		
VANGUARD INTL EQUITY INDEX		
VANGUARD REIT ETF		
STRATEGIC ADVISERS CORE FUND	281,207	291,962
STRATEGIC ADVISERS GROWTH FUND	152,357	158,386
STRATEGIC ADVISERS VALUE FUND	164,363	165,322
STRATEGIC ADVISERS EMERGING MARKETS	20,700	20,479
STRATEGIC ADVISERS SMALL-MID CAP FD	91,290	89,389
STRATEGIC ADVISERS INTERNATIONAL FD	314,642	291,966
ARDEN ALTERNATIVE STRATEGIES CLASS I	16,422	15,275
BLACKSTONE ALTERNTV MULTI-MANAGER I	16,489	15,534
MERGER FUND	16,043	15,642

TY 2014 Other Decreases Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Description	Amount
2014 DIVIDEND BOOKED IN 2015	146

TY 2014 Other Expenses Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
PORTFOLIO DEDUCTIONS-POWERSHA	132	132		
FOREIGN TAXES DEDUCTED FROM D	524	524		
FIDELITY ACCOUNT FEES	5,266	5,266		
MISCELLANEOUS EXPENSE	141	141		

TY 2014 Other Increases Schedule

Name: PETERS FAMILY FOUNDATION

EIN: 43-1958273

Description	Amount
2013 DIVIDEND BOOKED IN 2014	148

2014 TAX REPORTING STATEMENT

PETERS FAMILY FOUNDATION TRUST Account No. Y88-632900 Customer Service. 800-544-5704
Recipient ID No **-***8273 Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2014 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
Proceeds are reported as **gross proceeds** unless otherwise indicated (a).(This Label is a Substitute for Boxes **2, 3, 5 & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (b)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4** Federal Income Tax Withheld	**14** State	**16** State Tax Withheld
ARDEN ALTERNATIVE STRATEGIES CLASS I, ARDNX, 039786306										
Sale	23.429	03/26/14	06/17/14	246.00	242.83		3.17			
BLACKSTONE ALTERNTV MULTI MANAGER I, BXMMX, 09257V102										
Sale	22.727	03/26/14	06/17/14	245.00	241.25		3.75			
FIDELITY TOTAL BOND, FTBFX, 31617K881										
Sale	147.097	03/26/14	06/17/14	1,571.00	1,557.16		13.84			
Sale	548.327	03/26/14	10/16/14	5,900.00	5,805.33		94.67			
Subtotals				**7,471.00**	**7,362.49**					
MANAGERS PIMCO BOND FUND, 561717638										
Sale	21.805	various	03/26/14	231.78	237.52		-5.74			
MERGER FUND, MERFX, 589509108										
Sale	15.207	03/26/14	06/17/14	250.00	244.00		6.00			
METROPOLITAN WEST HIGH YIELD BOND CL M, MWHYX, 592905871										
Sale	257.346	various	03/26/14	2,668.68	2,619.66		49.02			
PIMCO SHORT TERM ADMINISTRATIVE SHS, PSFAX, 693390734										
Sale	12.626	03/26/14	06/17/14	125.00	124.81		0.19			
Sale	798.180	various	08/04/14	7,894.00	7,890.00		4.00			
Subtotals				**8,019.00**	**8,014.81**					

*** This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.**

Fidelity INVESTMENTS

2014 TAX REPORTING STATEMENT

PETERS FAMILY FOUNDATION TRUST   Account No **Y88-632900**   Customer Service 800-544-5704
Recipient ID No ****-****8273**   Payer's Fed ID Number. 04-3523567

FORM 1099-B*

2014 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
Proceeds are reported as **gross proceeds** unless otherwise indicated (a).(This Label is a Substitute for Boxes **2, 3, 5 & 6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (b)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4** Federal Income Tax Withheld	**14** State	**16** State Tax Withheld
PIMCO TOTAL RETURN ADMINISTRATIVE SHS, PTRAX, 693390726										
Sale	97.976	03/26/14	06/17/14	1,065 00	1,056 13		8 87			
Sale	292.237	03/26/14	10/16/14	3,200 00	3,150 47		49.53			
Subtotals				**4,265.00**	**4,206.60**					
STRATEGIC ADVISERS CORE FUND, FCSAX, 31635R504										
Sale	192 571	03/26/14	06/17/14	3,033 00	2,898 60		134 40			
Sale	563 204	03/26/14	12/04/14	9,000 00	8,435 85		564 15			
Subtotals				**12,033 00**	**11,334.45**					
STRATEGIC ADVISERS CORE INCOME FUND, FPCIX, 31635R884										
Sale	266 385	03/26/14	06/17/14	2,837 00	2,814 51		22 49			
Sale	948 837	03/26/14	10/16/14	10,200 00	10,026 04		173 96			
Subtotals				**13,037.00**	**12,840.55**					
STRATEGIC ADVISERS EMERGING MARKETS, FSAMX, 31635R801										
Sale	34 722	03/26/14	06/17/14	350 00	322 59		27.41			
STRATEGIC ADVISERS GROWTH FUND, FSGFX, 31635R603										
Sale	338 369	03/26/14	06/04/14	5,600.00	5,415 15		184 85			
Sale	147 413	03/26/14	06/17/14	2,450.00	2,359 15		90 85			
Sale	481 718	03/26/14	12/04/14	8,300 00	7,717 91		582 09			
Subtotals				**16,350.00**	**15,492.21**					

*** This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.**

Fidelity INVESTMENTS

2014 TAX REPORTING STATEMENT

PETERS FAMILY FOUNDATION TRUST Account No. Y88-632800 Customer Service. 800-544-5704
Recipient ID No. **-***8273 Payer's Fed ID Number 04-3523567

FORM 1099-B* **2014 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB No. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
Proceeds are reported as **gross proceeds** unless otherwise indicated (a).(This Label is a Substitute for Boxes **2, 3, 5 & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (b)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4** Federal Income Tax Withheld	**14** State	**16** State Tax Withheld
STRATEGIC ADVISERS INCOME OPPORTUNITIES, FPIOX, 31635R876										
Sale	100.191	03/26/14	06/17/14	1,050.00	1,042.43		7.57			
Sale	727.273	03/26/14	07/15/14	7,600.00	7,567.20		32.80			
Subtotals				**8,650.00**	**8,609.63**					
STRATEGIC ADVISERS INTERNATIONAL FUND, FILFX, 31635R868										
Sale	560.662	03/26/14	06/04/14	6,100.00	5,923.16		176.84			
Sale	457.706	03/26/14	06/17/14	4,989.00	4,835.48		153.52			
Sale	365.736	03/26/14	12/04/14	3,800.00	3,865.11	W 65.11	-65.11			
Subtotals				**14,889.00**	**14,623.75**					
STRATEGIC ADVISERS SHORT DURATION FUND, FAUDX, 31635R769										
Sale	104.955	03/26/14	06/17/14	1,059.00	1,057.95		1.05			
STRATEGIC ADVISERS SMALL-MID CAP FD, FSCFX, 31635R843										
Sale	89.280	03/26/14	06/17/14	1,191.00	1,227.02	W 36.02	-36.02			
Sale	254.491	03/26/14	12/04/14	3,400.00	3,451.11	W 24.59	-51.11			
Subtotals				**4,591.00**	**4,678.13**					
STRATEGIC ADVISERS US OPPTY FUND, FUSOX, 31635R835										
Sale	104 435	03/26/14	06/17/14	1,248.00	1,277.29		-29.29			
Sale	3,942.953	various	08/04/14	47,000.00	48,224.18		-1,224.18			
Sale	2,679.539	various	08/07/14	31,457.79	32,772.04		-1,314.25			
Subtotals				**79,705.79**	**82,273.51**					

*** This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.**

Fidelity INVESTMENTS

2014 TAX REPORTING STATEMENT

PETERS FAMILY FOUNDATION TRUST Account No. Y88-632900 Customer Service: 800-544-5704
Recipient ID No **-***8273 Payer's Fed ID Number 04-3523567

FORM 1099-B* **2014 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB No. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
Proceeds are reported as **gross proceeds** unless otherwise indicated (a).(This Label is a Substitute for Boxes 2, 3, 5 & 6)

(IRS Form 1099-B box numbers are shown below in **bold type**)

1a Description of property, Stock or Other Symbol, CUSIP

Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (b)	**1f** Code, If Any (c) **1g** Adjustments	Gain/Loss (-)	**4** Federal Income Tax Withheld	**14** State	**16** State Tax Withheld
STRATEGIC ADVISERS VALUE FUND, FVSAX, 31635R702										
Sale	139.640	03/26/14	06/17/14	2,716.00	2,594.93		121.07			
Sale	179.704	03/26/14	07/15/14	3,400.00	3,342.62		57.38			
Sale	253.093	03/26/14	10/16/14	4,500.00	4,707.71		-207.71			
Sale	409 712	03/26/14	12/04/14	8,100.00	7,620.93		479.07			
Subtotals				**18,716.00**	**18,266.19**					
TEMPLETON GLOBAL BOND CLASS A, TPINX, 880208103										
Sale	28.647	03/26/14	06/17/14	381.00	372.32		8.68			
TOTALS				**193,158.25**	**193,040.44**			**0.00**		
		Box A Short-Term Realized Gain					**3,051.22**			
		Box A Short-Term Realized Loss					**-2,933.41**			
		Box A Wash Sale Loss Disallowed				**125.72**				
		Box A Market Discount				**0.00**				

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