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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

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation THE PETERSON FAMILY FOUNDATION INC		A Employer identification number 54-1870812	
Number and street (or P O box number if mail is not delivered to street address) 12500 FAIR LAKES CIRCLE SUITE 400		Room/suite	B Telephone number (see instructions) (703) 631-7316
City or town, state or province, country, and ZIP or foreign postal code FAIRFAX, VA 22033			
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div>		<div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 19,182,278		E If private foundation status was terminated under section 507(b)(1)(A), check here	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	22,815,127			
	2 Check ▶ <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	60	60	60	
	4 Dividends and interest from securities	2,011	2,011	2,011	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	282,948			
	b Gross sales price for all assets on line 6a 1,460,573				
	7 Capital gain net income (from Part IV, line 2) . . .				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	44,235		44,235	
	12 Total.Add lines 1 through 11	23,144,381	2,071	46,306	
	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).	15,329			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	12,222			
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	130,000			
	24 Total operating and administrative expenses. Add lines 13 through 23	157,551	0		0
	25 Contributions, gifts, grants paid	3,878,716			3,878,716
	26 Total expenses and disbursements.Add lines 24 and 25	4,036,267	0		3,878,716
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	19,108,114			
	b Net investment income (if negative, enter -0-)		2,071		
	c Adjusted net income(if negative, enter -0-) . . .			46,306	

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	722,503	996,571	996,571	
	3	Accounts receivable ▶ <u>925,000</u>				
		Less allowance for doubtful accounts ▶ _____		925,000	925,000	
	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)				
	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)		13,229,707	13,229,707		
14	Land, buildings, and equipment basis ▶ <u>4,031,000</u>					
	Less accumulated depreciation (attach schedule) ▶ _____		4,031,000	4,031,000		
15	Other assets (describe ▶ _____)					
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	722,503	19,182,278	19,182,278		
Liabilities	17	Accounts payable and accrued expenses	276,154			
	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 ▶ _____)	75,276	-296,909		
	23	Total liabilities(add lines 17 through 22)	351,430	-296,909		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg , and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds	371,073	19,479,187		
	30	Total net assets or fund balances(see instructions)	371,073	19,479,187		
31	Total liabilities and net assets/fund balances(see instructions)	722,503	19,182,278			

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	371,073		
2	Enter amount from Part I, line 27a	2	19,108,114		
3	Other increases not included in line 2 (itemize) ▶ _____	3			
4	Add lines 1, 2, and 3	4	19,479,187		
5	Decreases not included in line 2 (itemize) ▶ _____	5			
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	19,479,187		

Part IV

Capital Gains and Losses for Tax on Investment Income

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

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

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

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))
2014	889,957	174,640	5 095952
2013	1,254,328	1,629,834	0 769605
2012	1,445,785	1,849,409	0 781755
2011	1,578,063	1,025,032	1 539526
2010	1,866,004	716,141	2 605638

2	Total of line 1, column (d).	2	10 792476
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	2 158495
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	19,071,570
5	Multiply line 4 by line 3.	5	41,165,888
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	21
7	Add lines 5 and 6.	7	41,165,909
8	Enter qualifying distributions from Part XII, line 4.	8	3,878,716

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

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-)

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

b

Exempt foreign organizations—tax withheld at source.

6b

c

Tax paid with application for extension of time to file (Form 8868).

6c

d

Backup withholding erroneously withheld.

6d

7

Total credits and payments. Add lines 6a through 6d.

8

Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☐ **Refunded** ☐

1

41

2

3

41

4

5

41

6a

6b

6c

6d

7

8

9

41

10

11

Part VII-A

Statements Regarding Activities

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)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1b

No

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

Yes

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)
☐ VA _____

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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?
If "Yes," complete Part XIV.

9

Yes

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)*

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? Website address ▶N/A	13	Yes	
14	The books are in care of ▶BLANCA R RAMOS Located at ▶12500 FAIR LAKES CIRCLE SUITE 400 FAIRFAX VA Telephone no ▶(703) 631-7541 ZIP+4 ▶22033			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See 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 ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015? <input type="checkbox"/>	1c		
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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2015 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) <input type="checkbox"/>	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 2015?	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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

Total

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

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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 THE PETERSON FAMILY FOUNDATION IS COMMITTED TO WETLANDS RESEARCH TO MITIGATE THE CONSEQUENCES OF URBAN GROWTH. THE FOUNDATION SPONSORS A GRANT PROGRAM TO ALL EDUCATIONAL FACILITIES. IT AWARDS GRANTS TO THOSE EDUCATIONAL FACILITIES THAT CREATE NEW WETLAND RESEARCH INITIATIVES.	233,313
2 THE PETERSON FAMILY FOUNDATION IS DEDICATED TO HELP INDIVIDUALS OF LIMITED FINANCIAL RESOURCES. THE FOUNDATION HAS BEEN AFFILIATED WITH A CHURCH IN LA ROMANA, DOMINICAN REPUBLIC. THE FOUNDATION BUILT AND IS OPERATING A CHURCH-RELATED DAYCARE/EDUCATION CENTER. THE PURPOSE OF THE CENTER IS TO FEED CHILDREN OF LA ROMANA BEFORE AND AFTER SCHOOL, PROVIDE A PLAYGROUND AREA FOR THEM TO USE AFTER SCHOOL AND TO PROVIDE ADDITIONAL EDUCATIONAL ASSISTANCE TO SUCH CHILDREN. THE PROGRAM CURRENTLY FEEDS AND EDUCATES 250 CHILDREN.	130,000
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	250,000
b	Average of monthly cash balances.	1b	250,000
c	Fair market value of all other assets (see instructions).	1c	18,862,000
d	Total (add lines 1a, b, and c).	1d	19,362,000
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	19,362,000
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	290,430
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	19,071,570
6	Minimum investment return.Enter 5% of line 5.	6	953,579

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	
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	

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	3,878,716
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	3,878,716
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	3,878,716
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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 3,878,716				
a Applied to 2014, 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 2015 distributable amount.				
e Remaining amount distributed out of corpus	3,878,716			
5 Excess distributions carryover applied to 2015 (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	3,878,716			
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 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				
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 2010 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

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 2015, 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)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	
46,306	8,732	103	20,816	75,957
39,360	7,422	88	17,694	64,564
3,878,716	889,957	1,254,328	1,445,785	7,468,786
3,878,716	889,957	1,254,328	1,445,785	7,468,786
635,719	5,821	54,328	61,647	757,515

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))

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

See Additional Data Table

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 e-mail address of the person to whom applications should be addressed

BLANCA R RAMOS
12500 FAIR LAKES CIRCLE
SUITE 400
FAIRFAX, VA 22033
(703) 631-7541
BRAMOS@PETERSONCOS.COM

b

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

PURPOSE FOR WHICH FUNDS ARE SOLICITED, AMOUNT OF FUNDS SOLICITED, COPY OF MOST RECENT FORM 990 AND IRS DETERMINATION LETTER IF APPLICABLE

c

Any submission deadlines

NONE

d

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

NONE

Form 990-PF (2015)

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

Form **990-PF** (2015)

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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					60
4	Dividends and interest from securities.			1	2,011	
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		837,524			-554,576
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a FAIR LAKES CIRCLE RETAIL					1,647
b	GATEWAY CENTR IV					42,588
c						
d						
e						
12	Subtotal Add columns (b), (d), and (e).		837,524		2,011	-510,281
13	Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		329,254

[illegible]

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
MILTON V PETERSON	DIRECTOR 1 00	0	0	0
12500 FAIR LAKES CIRCLE SUITE 400 FAIRFAX,VA 22033				
LAUREN E PETERSON	PRESIDENT 5 00	0	0	0
12500 FAIR LAKES CIRCLE SUITE 400 FAIRFAX,VA 22033				
WILLIAM E PETERSON	TREASUER 0 00	0	0	0
12500 FAIR LAKES CIRCLE SUITE 400 FAIRFAX,VA 22033				
CAROLYN S PETERSON	DIRECTOR 1 00	0	0	0
12500 FAIR LAKES CIRCLE SUITE 400 FAIRFAX,VA 22033				
JON M PETERSON	VICE-PRESIDE 1 00	0	0	0
12500 FAIR LAKES CIRCLE SUITE 400 FAIRFAX,VA 22033				
STEVEN B PETERSON	SECRETARY 0 00	0	0	0
12500 FAIR LAKES CIRCLE SUITE 400 FAIRFAX,VA 22033				

Form 990PF Part XV Line 1b - 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.

MILTON V PETERSON
LAUREN P FELLOWS
WILLIAM E PETERSON
CAROLYN S PETERSON
JON M PETERSON
STEVEN B PETERSON

TY 2015 Accounting Fees Schedule

Name: THE PETERSON FAMILY FOUNDATION INC

EIN: 54-1870812

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	15,270			
BANK & FILING FEES	59			

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

TY 2015 Gain/Loss from Sale of Other Assets Schedule

Name: THE PETERSON FAMILY FOUNDATION INC
EIN: 54-1870812

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
500 SH COVIDIEN PUBLIC LIMITED COMPA	2010-07	PURCHASE	2015-01		52,070	16,804			35,266	
120 SH GOOGLE INC CMN CLASS A	2010-06	PURCHASE	2015-01		61,699	36,848			24,851	
939 SH HOST HOTELS & RESORTS, INC	2014-09	PURCHASE	2015-01		22,141				22,141	
682 SH HYATT HOTELS & RESORTS	2011-06	PURCHASE	2015-01		38,396	27,081			11,315	
597 SH LASALLE HOTEL PROPERTIES	2011-07	PURCHASE	2015-01		25,067	13,862			11,205	
1500 SH TWENTY FIRST CENTRUY FOX	2012-02	PURCHASE	2015-06		48,883	27,418			21,465	
1200 SH VIACOM INC	2012-02	PURCHASE	2015-06		80,094	54,049			26,045	
980 SH RYMAN HOSPITALITY PPTYS INC	2003-01	PURCHASE	2015-06		52,890	20,576			32,314	
417 SH MARRIOTT INTERNATIONAL INC	2014-09	PURCHASE	2015-06		32,075				32,075	
316 SH VIACOM INC	2012-02	PURCHASE	2015-06		20,813	15,212			5,601	
550 SH COMCAST CORPORATION	2012-02	PURCHASE	2015-06		31,888	14,251			17,637	
2860 SH TWENTY-FIRST CENTURY FOX	2012-02	PURCHASE	2015-06		92,263	50,056			42,207	
417 SH MARRIOTT VACATIONS WORLD WIDE	2011-06	PURCHASE	2015-01		2,982	888			2,094	
600 SH THE HOME DEPOT INC	2010-06	PURCHASE	2015-01		61,788	18,558			43,230	
PARTNERSHIP LOSS ON SALE	2012-02	PURCHASE	2014-12			882,022			-882,022	
LONG-TERM GAIN/LOSS FROM PASS- THROUGH ENTITY					837,524				837,524	

TY 2015 Investments - Other Schedule

Name: THE PETERSON FAMILY FOUNDATION INC

EIN: 54-1870812

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PARTNERSHIP INVESTMENTS	FMV	13,229,707	13,229,707

TY 2015 Land, Etc.
Schedule

Name: THE PETERSON FAMILY FOUNDATION INC
EIN: 54-1870812

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
PARCEL 38 NATIONAL HARBOR	4,031,000		4,031,000	4,031,000

TY 2015 Other Expenses Schedule

Name: THE PETERSON FAMILY FOUNDATION INC

EIN: 54-1870812

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
PROGRAM SERVICE EXPENSES	130,000			

TY 2015 Other Income Schedule

Name: THE PETERSON FAMILY FOUNDATION INC

EIN: 54-1870812

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FAIR LAKES CIRCLE RETAIL	1,647		1,647
GATEWAY CENTR IV	42,588		42,588

TY 2015 Other Liabilities Schedule

Name: THE PETERSON FAMILY FOUNDATION INC

EIN: 54-1870812

Description	Beginning of Year - Book Value	End of Year - Book Value
UNREALIZED GAIN/LOSS ON INVESTMENTS	75,276	-296,909

TY 2015 Taxes Schedule**Name:** THE PETERSON FAMILY FOUNDATION INC**EIN:** 54-1870812

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REAL ESTATE TAX	12,186			
FOREIGN TAXES	36			

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Accrual Basis

PFFI AND WETLAND Custom Transaction Detail Report January through December 2015

Name	Name Street2	Name City	Name State	Name Zip	SSN/Tax ID	Debit
Animal Welfare League of Alexandria Virgi		Alexandria	VA	22304	54-0796610	2,000 00
Annapolis High School	Po Box 6398	Annapolis	MD	21401	81-0576893	1,000 00
Arts Council of Fairfax County	2667 Prosperity Avenue	Fairfax	VA	22031	54-0784570	2,500 00
Autism Speaks	Second Floor	Washington	DC	20006	20-2329938	2,500 00
Cancer Research Institute	55 Broadway, Suite 1802	New York	NY	10006	13-1837442	250 00
Care Net Pregnancy Resource Center		Manassas	VA	20108	54-1372036	500 00
Children's Defense Fund	Suite 304	Washington	DC	20036	52-0895622	10,000 00
Children's Home Society of Virginia		Richmond	VA	23230	54-0505884	2,000 00
City Year, Inc	287 Columbus Avenue	Boston	MA	02116	22-2882549	3,000 00
Clifton Betterment Association	PO Box 94	Clifton	VA	20124	237-33-6428	5,000 00
Clifton Lions Club	P O Box 225	Clifton	VA	20124-0225	54-1743126	1,500 00
Clifton Presbyterian Church	PO Box 320	Clifton	VA	20124		1,000 00
College Summit	1763 Columbia Road, NW 2nd Fl	Washington	DC	20009	52-2007028	10,000 00
Department of Mining Engineering	5300 Wellington Branch Drive	Gainesville,	VA	20155		30,000 00
Excellence in Education Foundation	Prince George's County Public Schools	Upper Marlboro	MD	20772	45-3976683	500 00
Fairfax Baptist Temple Academy		Fairfax Station	VA	22039	54-0929143	500 00
Fairfax County Police Association		Fairfax	VA	22030	54-6043690	3,500 00
Fairfax Library Foundation	Suite 329	Fairfax	VA	22035-0059	54-1722709	1,000 00
Fairfax United Methodist Church		Fairfax	VA	22030-3217	54-0616475	35,000 00
Farm Sanctuary		Watkins Glen	NY	14891	51-0292919	1,000 00
Fauquier Community Food Bank	249 E Shirley Ave	Warrenton	VA	20186	90-0801730	500 00
Georgetown University	37th and O Sts NW	Washington	DC	20007	53-0196603	100 00
Gleaning For The World	7539 Stage Rd	Concord	VA	24538	54-1930105	375,501 53
Grace Church		Alexandria	VA	22305		2,000 00
Greenpeace Fund	Suite 300	Washington	DC	20001	95-3313195	500 00
Hawken School		Gates Mills	OH	44040-8002	34-0714427	1,000 00
Helping Children Worldwide	14101 Parke Long Court, Suite T	Chantilly	VA	20151	76-0729857	3,500 00
HOME		Alexandria	VA	22301	540-89-1903	500 00

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Accrual Basis

PFFI AND WETLAND
Custom Transaction Detail Report
January through December 2015

Name	Name Street2	Name City	Name State	Name Zip	SSN/Tax ID	Debit
HOPECAM INC	12110 Sunset Hills Rd	Reston	VA	20190	56-2416801	2,500 00
Inova Health System Foundation	8110 Gatehouse Road	Falls Church	VA	22042-9957	54-1071867	2,010,000 00
Inova Keller Center	11204 Waples Mill Road	Fairfax	VA	22030	54-1071867	7,500 00
Junior Achievement	1050 17th Street, NW Suite 750	Washington	DC	20036	54-0788947	15,000 00
Langley Residential Support Services Inc		Vienna	VA	22182	54-1285712	500 00
Leadership Fairfax, Inc	Suite 350	Vienna	VA	22182	54-1685151	2,250 00
Leukemia & Lymphoma Society	P O Box 4072	Pittsfield	MA	01202		200 00
Life With Cancer		Fairfax	VA	22031	54-1071867	37,300 00
Life With Cancer	c/o Vivian Thompson	Crownsville	MD	21032	54-1071867	25,000 00
Marymount University-HRLA		Arlington	VA	22207	54-0573801	2,500 00
Muscular Dystrophy Association	#1210	Reston	VA	20191	13-1665552	500 00
Niños De Cristo, Inc		Longwood	FL	32779	04-3793017	232,500 00
No Greater Sacrifice Foundation	6th Floor	Washington	DC		26-1572599	5,000 00
North Shore Animal League America , Inc		Port Washington	NY	11050	11-1666852	1,000 00
Northern Virginia Conservation Trust		Annandale	VA	22003	54-1724626	3,000 00
Northern Virginia Family Service	Suite 100	Oakton	VA	22124	54-0791977	101,000 00
Onyx & Breezy Foundation		Montvale	NJ	07645	13-7437754	500 00
Our Neighbors Child	PO Box 276	Centreville	VA	20120	54-1887072	500 00
PBO of the United States	2600 S W Third Avenue	Miami	FL	33129	52-1273588	1,000 00
Police Unity Tour Inc		Fairfax	VA	22038	22-3530541	2,500 00
Potomac Conservancy	Suite 805	Silver Spring	MD	20910	52-1842501	1,000 00
Rainbow Center 4H Therapeutic	Att Debi Alexander	Haymarket	VA	20168	54-1307995	16,666 67
Ronald McDonald House Charities		Falls Church	VA	22042	52-1132262	1,500 00
Saint Paul's Episcopal Church		Alexandria	VA	22314		4,000 00
Serenity Club of Alexandria, Inc		Alexandria	VA	22309		5,000 00
Shelter House, Inc	Suite 304	Reston	VA	20191	52-1217106	500 00
St Jude Children's Research Hospital		Memphis	TN	38101-9922	62-0646012	35 00
St Lawrence University	University Advancement Office	Canton	NY	13617	15-0532239	25,000 00
Teach For America, Inc	1805 7th Street, NW 7th Floor	Washington	DC	20001		250,000 00

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Accrual Basis

PFFI AND WETLAND Custom Transaction Detail Report January through December 2015

Name	Name Street2	Name City	Name State	Name Zip	SSN/Tax ID	Debit
The Baldwin School		Bryn Mawr	PA	19010	23-1352619	5,000 00
The Campagna Center		Alexandria	VA	22314	540-53-4609	1,000 00
The Child and Family Network Centers		Alexandria	VA	22304	54-1589809	50,000 00
The Community Foundation	Prince George's County	Washington	DC	20005	23-7343119	25,000 00
The First Tee Of Washington, DC	2020 Pennsylvania Ave NW	Washington	DC	20006	52-2195691	1,000 00
The Humane Society of the United States		Washington	DC	20037	53-0225390	1,000 00
The Patricia M Sitar Center for the Arts	Suite 101	Washington	DC	20009	52-2113471	10,000 00
The Sarah Howard Childhood Cancer Fund	1600 Duke ST	Alexandria	VA	22314-3421	52-1429544	1,600 00
The UCLA Foundation	110 Westwood Plaza Mullin Management Comm	Los Angeles	CA	90095	95-2250801	30,000 00
Town of Clifton		Clifton	VA	20124		2,000 00
Treasurer VA Tech	5301 Wellington Branch Drive	Gainesville,	VA	20156		203,313 00
Upperville Colt & Horse Association, Inc		Upperville	VA	20185	23-7390149	20,000 00
Venture Philanthropy Partners	Suite 510	Washington	DC	20005	31-1713618	150,000 00
Virginia Athletics Foundation		Charlottesville	VA	22904-4833	54-0517188	1,000 00
Virginia Horse Center Foundation	568 Hops Hill	Glasgow	VA	24555	52-1388640	2,500 00
WAMU 88.5	4400 Massachusetts Ave. NW	Washington	DC	20016-8082		500 00
Washington International Horse Show		Washington	DC	20007	53-0260530	30,000 00
Washington Redskins Charitable Foundation		Ashburn	VA	20147	54-1982366	5,000 00
Westgrove PACK LLC		Alexandria	VA	22307	46-3875990	500 00
WETA	3939 Campbell Avenue	Arlington	VA	22206	53-0242992	500 00
York Hospital		York	ME	03909	01-0212444	50,000 00
York Public Library		York	ME	03909	01-0360256	1,000 00
Young Life	11240 Waples Mill Road	Fairfax	VA	22030		2,500 00
Youth For Tomorrow		Bristow	VA	20136	52-1342268	35,000 00
Total						3,878,716.20