## 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. ► Go to www.irs.gov/Form990PF for instructions and the latest information.

FOI	r ca	alen	ndar year 2019 or tax year beginning		, and ending			
			f foundation		`		A Employer identification	number
	JC	H	<u>N</u> & CAROLYN PETERSON CH	ARITABLE				,
		_	NDATION INC.				43-1974269	
			and street (or P O box number if mail is not delivered to street	address)	Room	/suite	B Telephone number	
			BOX 1507			•	(262) 821-	5378
			own, state or province, country, and ZIP or foreign p	ostal code			C If exemption application is pe	ending, check here
			OKFIELD, WI 53005					
G	Cr	ieck	all that apply:		ormer public charity		D 1. Foreign organizations	s, check here
			Final return	Amended return			Foreign organizations me check here and attach co	eting the 85% test,
, <del></del>	-		Address change	Name change			check here and attach co	mputation
) H	Cr		type of organization: X Section 501(c)(3) e			)4	E If private foundation sta	
<u>سل</u> ا ما	<u> </u>		ection 4947(a)(1) nonexempt charitable trust arket value of all assets at end of year J Account	Other taxable private foundaring method: X Cash	Accrual		under section 507(b)(1)	
			·   —	ther (specify)	Acciuai		F If the foundation is in a under section 507(b)(1)	
,	) II U		8 , 121 , 905 . (Part I, colu		ıs.)		under section 507(b)(1)	(b), check here
ξP	_	it I	Analysis of Revenue and Expenses			ent	(a) Adjusted net	(d) Disbursements
ę <u>.                                    </u>		-, •	The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)	(a) Revenue and expenses per books	(b) Net investm income	wiil	(c) Adjusted net income	for charitable purposes (cash basis only)
_	Т	1	Contributions, gifts, grants, etc., received			The Carlo		5530 1283 3343 1
		2	Check X if the foundation is not required to attach Sch. B			7v.W		
		3	Interest on savings and temporary cash investments	and the second s	A read the later plants and process		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
<b>-</b>		4	Dividends and interest from securities	204,906.	204,9	06.	•	STATEMENT 1
2020		5a	Gross rents					
		b	Net rental income or (loss)	Mission and the state of		· 源 · 演		WHEELSTAN FLASSES ON
რე ⇒		6a	Net gain or (loss) from sale of assets not on line 10	-2,942.		いなながら	3.25% 计模拟分类	等。 中国的中国XED
>	Revenue		Gross sales price for all assets on line 6a 1,797,712.	N. CONTRACTOR	CHARLE TO A CONTROL	<b>STAN</b>	NO SAMPLE AND THE	
	Ş			<b>的心理是一个人的人们的</b>		0.	発展の表現の	<b>为题《张文·李文》</b> 。
2 (	ř	8	Net short-term capital gain			を記録	N/A	DARKING TAKOKO
Ω	١	9	Income modifications	PASSESSES AND LONG		是国际		
Щ	ŀ	10a	Gross sales less returns ' and allowances					SCOROSNIU T
<b>É</b>	ı	b	Less Cost of goods sold					3.79.000
SCANNED	1	C	Gross profit or (loss)		GENNERAL CON	18 P		
ပ္တ	ľ	11	Other income · · ·		004	2.5		
·,	4	12	Total. Add lines 1 through 11	201,964.	204,9		0.	
3	1	13	Compensation of officers, directors, trustees, etc	∖ 8,500.	4,2	50.	0.	4,250.
		14	Other employee salaries and wages					
Penely	- 1		Pension plans, employee benefits					
<b>B</b>	enses		Legal fees Accounting fees STMT 2	5,160.	2,5	0.0	0.	2,580.
₹ <b>%</b>				49,499.	49,4		0.	0.
	EX EX		•	49,499.	47,4	<i>55</i> •	<u> </u>	•
	21	17 18	Interest Taxes STMT 4	11,241.	3,8	29.	0.	0.
AUG	Stra	19	Depreciation and depletion		3,0			
<b>ာ</b>	롉.	20	Occupancy					CONTROL DESCRIPTION OF THE PROPERTY OF
$\infty$	悥.	21	Travel, conferences, and meetings					
2 8 2020 2 8 2020	و او	22	Printing and publications				·	
63	Ĕ,	23	Other expenses				~	, , , , , , , , , , , , , , , , , , , ,
		24	Total operating and administrative			•		
	perating and	. •	expenses. Add lines 13 through 23	74,400.	60,1	58.	0.	. 67,830.
d	<b>j</b>	25	Contributions, gifts, grants paid	375,330.	4400-14-15	STAR.		375,330.
	- 1		Total expenses and disbursements.					
			Add lines 24 and 25	449,730.	60,1	<u>58.</u>	0.	382,160.
	1	27				1974		
		а	Excess of revenue over expenses and disbursements	-247,766.		No.		
		b	Net investment income (if negative, enter -0-)	NEW THE PARTY	144,7	48.		
	1	C	Adjusted net income (if negative, enter -0-)		Paring No.	級交流	0.	5 000 PE 001A

## JOHN & CAROLYN PETERSON CHARITABLE

43-1974269 FOUNDATION INC. Form 990-PF (2019) Page 2 Beginning of year Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only End of year (c) Fair Market Value (a) Book Value (b) Book Value 5,214 5.214 5.214. 1 Cash - non-interest-bearing 239,040. 176,711. 176,711 2 Savings and temporary cash investments 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 7 Other notes and loans receivable Less: allowance for doubtful accounts 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 56,240. 71,736. 10a Investments - U.S. and state government obligations 68,461. 3,197,211.STMT 6 3,336,655. 7,062,912. b Investments - corporate stock 774,191. STMT 7 832,405. 805,332. c Investments - corporate bonds 11 Investments - land, buildings, and equipment basis Less accumulated depreciation 12 Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment basis Less accumulated depreciation 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the 4,221,788 4,469,554. 8,121,905 instructions. Also, see page 1, item I) 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 22 Other liabilities (describe 0. 23 Total liabilities (add lines 17 through 22) Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. Balances Net assets without donor restrictions 25 Net assets with donor restrictions Foundations that do not follow FASB ASC 958, check here 🕨 🗓 and complete lines 26 through 30. 26 Capital stock, trust principal, or current funds ŏ 0. 0. 27 Paid-in or capital surplus, or land, bldg., and equipment fund 4,221,788. 4,469,554. 28 Retained earnings, accumulated income, endowment, or other funds 4,469,554. 4,221,788. 29 Total net assets or fund balances je 4,469,554. 4,221,788 30 Total liabilities and net assets/fund balances **Analysis of Changes in Net Assets or Fund Balances** Part III 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 4,469,554. (must agree with end-of-year figure reported on prior year's return) 247,766. 2 Enter amount from Part I, line 27a 0. Other increases not included in line 2 (itemize) 4,221,788. Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) 4,221,788. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29 Form **990-PF** (2019)

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トしい	NUA	T = 0	JN	TNC.

43-1974269 Page 3

Part IV	Capital Gains an	d Losses for Tax on In	vestment	Income	SE	E A	ГТАСНЕ	D S	TATEM	ENT
		kınd(s) of property sold (for exa nouse; or common stock, 200 shs		te,	( <b>b)</b> D	How ac - Purch - Dona	quired ( hase ition	c) Date (mo., c	acquired lay, yr.)	(d) Date sold (mo., day, yr.)
1a										
_b				_	<u> </u>					
<u> </u>					<u> </u>					
<u>d</u>					<u> </u>					
e	<del></del>		<del></del>		L.,					l
(e) (	Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale					ain or (loss s (f) minus	
<u>a</u>			ļ							
<u>b</u>		<u></u>			-		<del></del>			
<u>c</u>					$\dashv$				<del></del>	. —
_d	1,797,712.			1,800,65	$\frac{1}{\sqrt{1}}$	-				-2,942.
Complet		pain in column (h) and owned by			* •		/IV /	Coupe 10	`al (b) assa	
Comple	te unity for assets showing g				$\dashv$				Col. (h) gain not less tha	
(i) FM	IV as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (i) col. (j), if any					(from col. (	
					$\rightarrow$					<del></del>
<u>a</u> b		<del> </del>			$\dashv$				-	
					<del></del>					-
d										
<u>е</u>										-2,942.
		Crandon	P- 41 1		7	T			•	2,312.
2 Capital ga	ain net income or (net capita	If gain, also enter al loss) { If (loss), enter -0			<u>}</u> [	2				-2,942.
3 Net short	-term capital pain or (loss):	as defined in sections 1222(5) ar								
	so enter in Part I, line 8, col		.0 (0).		)					
• ,	enter -0- in Part I, line 8	• •			Ŋ	3				-99,856.
Part V	Qualification Und	ler Section 4940(e) for	Reduced	Tax on Net	Inve	stme	ent Incon	ne		
Was the four		part blank. I 4942 tax on the distributable am Inder section 4940(e). Do not com		•	iod?					Yes X No
		h column for each year; see the ir			itries					
7 Litter tite	<u> </u>	· · · · · · · · · · · · · · · · · · ·	istractions but	oro making any or				T		(d)
Calendar	(a) Base period years year (or tax year beginning i	<del></del>		Net value of no		ıtable-u			Distrit (col. (b) div	oution ratio nided by col. (c))
	2018	37	0,220. 7,790.	<u> </u>	<u>/</u>	<u>ΛΛ'</u>	8, <u>479.</u> 7,498.	+		.046699
	2017		5,663.				0,450.	$\vdash$		.048716
	2016 2015		9,157.				7,794.			.048350
	2014		9,274.				$\frac{7}{3}, \frac{7}{594}$			.046315
	2014		<i>., </i>			, 0 ,	<del>,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,</del>			.010313
2 Total of l	ine 1, column (d)							2		.236910
	. , ,	ear base period - divide the total of	on line 2 hv 5.0	), or by the numbe	er of v	ears				
•	lation has been in existence	•	on mio 2 by o	5, 51 by 1115 11511150	,, .,	<b>54</b> , 5		3		.047382
4 Enter the	net value of noncharitable-u	use assets for 2019 from Part X,	line 5					4		7,518,652.
E Multinhol	ine 4 by line 3							5		356,249.
5 Mulliply I	ine 4 by line 3							3	-	
6 Enter 1%	of net investment income (	1% of Part I, line 27b)					,	6		1,447.
7 Add lines	5 and 6							7		357,696.
8 Enter qua	difying distributions from Pa	art XII, line 4						8		382,160.
		e 7, check the box in Part VI, line	1b, and comp	lete that part using	g a 19	% tax ra	ite.			
	art VI instructions.		_				_			orm <b>990-PF</b> (2019)
923521 12-17-	199									OTH (2019)

RartiV Capital Gains and Lo		43-19	74209	PAGE I OF I
	sses for Tax on Investment Income	<del> </del>	(h) How	acquired
	d describe the kind(s) of property sol irick warehouse; or common stock, 20		1 , , ,	acquired (c) Date acquired (d) Date sold (mo., day, yr.)
	MMARY	00 5113. WEG 00.	D - Do	P 01/01/1912/31/19
	MMARY			P 01/01/1912/31/19 P 01/01/1812/31/19
	MMARY			P 01/01/18µ2/31/19 P 01/01/19µ2/31/19
	MMARY			
	MMARY MMARY			P 01/01/1912/31/19
				P 01/01/1812/31/19
	MMARY MMARY			P 01/01/1912/31/19 P 01/01/1912/31/19
	MMARY	<del></del>		P 01/01/1912/31/19 P 01/01/1812/31/19
1 MS ACC1 762 SU.	MMARI		<del></del>	P 01/01/18H2/31/19
				<del></del>
<u>k</u>				
<u>n</u>				
0	(6) Depression allowed	(a) Cost or other have	l	(h) Coin or (loca)
(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 22,114.	(5. 55114510)	21,140.		974.
70 750		51,918.		18,835.
400 001		498,694.	<del></del>	-11,873.
400 050		350,238.		59,021.
204 (25		310,654.		-26,029.
f 284,625.		439,370.		5,605.
g -63,026.		439,370:		-63,026.
h 1,312.		1,214.		98.
140,879.		127,426.		13,453.
1 140,075.		127,420.	<del></del>	13,433.
<u></u>				
1				
m				
n				
0				······································
	ng gain in column (h) and owned by t	the foundation on 12/31/69		(I) Losses (from col. (h))
	(j) Adjusted basis	(k) Excess of col. (i)	Gains (	excess of col. (h) gain over col. (k),
(i) F.M.V. as of 12/31/69	as of 12/31/69	over col. (j), if any		but not less than "-0-")
a			**	974.
b				18,835.
c			**	-11,873.
d				59,021.
e			**	-26,029.
f				5,605.
g		-	**	-63,026.
h			**	98.
I				13,453.
J				
k				
1				
m				
n				
0				
		on Don't Lives 7		
2 Capital gain net income or (net ca	apital loss) { If gain, also enter If (loss), enter "-0	in Part I, line / )-" in Part I, line 7 }	2	-2,942.
	ss) as defined in sections 1222(5) and	` `		
If gain, also enter in Part I, line 8,		u (O).		
If (loss), enter "-0-" in Part I, line		J	3	-99,856.
			—· •	
000504				

\*\* (SHORT-TERM)

## JOHN & CAROLYN PETERSON CHARITABLE

	n 990-PF (2019) FOUNDATION INC.		-1974269 Page 4
Pa	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	<u> 4948 -</u>	see 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 X and enter 1%	1	1,447.
	of Part I, line 27b	250	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)	36	
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	2	0.
3	Add lines 1 and 2	3	1,447.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,447.
6	Credits/Payments:	16.0	
a	2019 estimated tax payments and 2018 overpayment credited to 2019 6a 4, 320		
	Exempt foreign organizations - tax withheld at source 6b 0	7 6352223	
	Tax paid with application for extension of time to file (Form 8868)  6c		
	I Backup withholding erroneously withheld 6d 0	7	
	Total credits and payments. Add lines 6a through 6d	7	4,320.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8	0.
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	2,873.
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax	11	0.
	art VII-A: Statements Regarding Activities	1.!!	
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interve	ne in	Yes No
Ia	any political campaign?		1a X
	old it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the de-	finition	1b X
U	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or	iiiillion	उन्हरिक इन्हरून इन्हरू
	distributed by the foundation in connection with the activities.		
	Did the foundation file Form 1120-POL for this year?		1c X
a	I Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year.  (1) On the foundation. ► \$ 0 • (2) On foundation managers. ► \$ 0		
		•	
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation		
_	managers. > \$		اشتنا عتا عائنا
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2 X
_	If "Yes," attach a detailed description of the activities.		
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation	or	
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3 X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a X
	of "Yes," has it filed a tax return on Form 990-T for this year?	1	V/A 4b ε
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5 X
	If "Yes," attach the statement required by General Instruction T		
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 st	ite law	
	remain in the governing instrument?		6 X
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 X
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. 🕨		
	WI		
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 X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for call	lendar	Z
	year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV		9 X 4
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10 X
			Form <b>990-PF</b> (2019)
			()

₽.	if VII Statements Regarding Activities (continued)			
	•	12	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	•	х
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		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	<del></del>
	Website address ► N/A	رحني		Ь
14	The books are in care of ► MICHAEL GUZNICZAK  Telephone no. ► 262-82	21 – 5	378	
	Located at ▶PO BOX 1507, BROOKFIELD, WI ZIP+4 ▶5			
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	N	/A	
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	27.02	900 E.	i de la companya de l
	foreign country		2 5 7 5 7 5 8 5 8 5 8 5 8 5 8 5 8 5 8 5 8	
įΡε	igt VII-B Statements Regarding Activities for Which Form 4720 May Be Required	(A) (A)	· -, ,	A09.1 18
1 200	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	松瀬原	Yes	No
1.	During the year, did the foundation (either directly or indirectly):	- 1 85°		<b>38</b> 2274
14			a for side	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		1	
	a disqualified person?	33.5		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available	\$7.05%.	1 4 7	
			الإنسان أ	
	(6) Agree to pay money or property to a government official? (Exception. Check "No"		5-7-4 	
	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 X No		****************	
D	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	-230	<u> </u>	لنثة X
	section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	الاعلىدى	A
	Organizations relying on a current notice regarding disaster assistance, check here			
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected	525	<u> </u>	
_	before the first day of the tax year beginning in 2019?	1c	eza jek	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
	defined in section 4942(j)(3) or 4942(j)(5)):	23.2		
а	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines			
	6d and 6e) for tax year(s) beginning before 2019?  Yes X No			
	If "Yes," list the years , , , , , , , , , , , , , , , , , , ,		ું જુંલ	
D	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	200 S	~``~`@ <u>\$</u>	
	statement - see instructions.)  N/A	2b	XX:25	Salassa
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		4 11 12	
	<u> </u>		} -29 }	
3 <b>a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time		12.5	
	during the year?			
b	If "Yes," did it have excess business holdings in 2019 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		1. TA	
	of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720,		£.92	
	Schedule C, to determine if the foundation had excess business holdings in 2019.)  N/A	3b		<del></del>
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	20042	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that		<i>E. V.</i>	
	had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		X
	Fo	rm <b>990</b>	-PF (	(2019)

			1	
	<u> </u>			
2 Compensation of five highest-paid employees (other than those inc	cluded on line 1). 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, othe allowances
NONE	-			
,				
			-	
			ļ	
Total number of other employees paid over \$50,000			ightharpoonup	(

0.

All other program-related investments. See instructions.

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	dation	s, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	7,627,935.
b	Average of monthly cash balances	1b	7,627,935. 5,214.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	7,633,149.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	7,633,149.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	114,497.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	7,518,652.
6	Minimum investment return. Enter 5% of line 5	6	375,933.
Р	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an foreign organizations, check here ▶ □ and do not complete this part.)	d certaıı	1
1	Minimum investment return from Part X, line 6	1	375,933.
2a	Tax on investment income for 2019 from Part VI, line 5 2a 1,447.		
b	Income tax for 2019. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	1,447.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	374,486.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	374,486.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	374,486.
<u></u>	art XII Qualifying Distributions (see instructions)	T	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	40	382,160.
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a 1b	0.
Ь	Program-related investments - total from Part IX-B	2	<u></u>
2 3	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  Amounts set aside for specific charitable projects that satisfy the:		
_	Suitability test (prior IRS approval required)	3a	
	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	382,160.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	7	302,100.
3	Income. Enter 1% of Part I, line 27b	5	1 447
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,447. 380,713.
U	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q	ــــــــــــــــــــــــــــــــــــــ	
	4940(e) reduction of tax in those years.	uaiiiles l	OF UTO 3600011
_	10 10(0) research or an in those years.		- 000 DE

Part XIII Undistributed Income (see instructions)

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 2014 not applied on line 5 or line 7  9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a  0 •			(a) Corpus	(b) Years prior to 2018	(c) 2018	( <b>d)</b> 2019
2. Undastabated rooms, fam, see of the red of 3819 Enter armunit for 2018 only Total for prior years: 3. Excess distributions carryover, if any, to 2019; a From 2014 From 2015 From 2015 From 2016 From 2017 From 2018 1 Tatal of the size 3 through e 4. Qualifying distributions for 2019 from Part XII, lime 4.* S 382, 1.6.0. A Applied to 2018, but not more than line 2 a b Applied to undistributed encene of prior years (Rection required - see instructions) d Applied to 2019 distributable amount (Rection required - see instructions) d Applied to 2019 distributable amount Rectinating and the see of the se	1	·				374.486.
a Enter amount for 2018 only b Total for pror years:  2 Excess distributions carryover, if any, to 2019: a From 2015 b From 2016 c From 2016 d From 2017 e From 2018  1 Total of lines 3 through e  4 Qualifying distributions for 2019 from Part XII, line x ► ► 382,160. a Applied to 2018, but not more than time 2a b Applied to 2018, but not more than time 2a b Applied to 2018 but not more than time 2a b Applied to 2018 distributions out of corpus (Election required - see instructions)	2	•		· · · · · · · · · · · · · · · · · · ·	<u></u>	5,1,1000
\$ Excess distributions carryover, if any, to 2019; a From 2014 b From 2015 c From 2015 c From 2016 d From 2017 c From 2018 c F				:	367,727.	
3 Excess distributions carryover, if any, to 2019:  a From 2014 b From 2015 c From 2016 d From 2017 e From 2016 Total of lines 3a through e  4 Qualifying distribution for 2019 from Part XII, line 4: № \$ 382 , 160 .  a Applied to 2016, but not more than line 2  b Applied to 2016, but not more than line 2  b Applied to 2016, but not more than line 2  b Applied to 2016, but not more than line 2  b Applied to 2016 distributible amount (Election required - see instructions)  4 Applied to 2019 distributible amount Remaining amount distributed out of corpus  5 Excess distributions carryove applied to 2018 because the second of the second to the second must be found to the second must be distributed income. Subtract line 4b from line 20  6 Enter the actual of each column as indicated below:  a Corpus Adelmed 34, e., and 4e Subsact lines  b Prior years' undistributed income. Subtract line 4b from line 20  c Enter the amount of prior years' disdicingly has been previously assessed  3 Subtract line 6c from line 6, 17 and line  a from line 22. Taxable amount - see instructions  0 .  Undistributed income for 2019, Subtract line 4a from line 2, 17 axable amount - see instructions  0 .  Undistributed income for 2019, Subtract line 4a from line 2, 17 axable amount - see instructions  0 .  Undistributed income for 2019, Subtract line 4a from line 2, 17 axable amount - see instructions  0 .  360 , 053 .  3		-			·	
a From 2014 b From 2015 c From 2016 d From 2017 e From 2018  1 Testal of Intes Sa throughe  0 .  4 Applied to 2016, but not more than line 2a b Applied to 2016, but not more than line 2a b Applied to 2016, but not more than line 2a b Applied to 2016 distributions out of corpus (Election required - see instructions)  0 .  4 Caption of 2019 distributions out of corpus (Election required - see instructions)  0 .  4 Applied to 2016 distributions out of corpus (Election required - see instructions)  0 .  4 Applied to 2019 distributions out of corpus (Election required - see instructions)  0 .  5 Excess distributions curryone applied to 2018 must be absent income services applied to 2018 must be absent income services applied to 2018 notice that below the section of 44(2) to a text being income services  0 .  0 .  14 4, 433 .  15 Excess distribution out of corpus  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  14 4, 433 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  0 .  0 .  0 .  14 4, 433 .  0 .  0 .  0 .  0 .  0 .  0 .  0 .	_	Evenes distributions corrupter if any to 2010:		U •		
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6 From 2016 d From 2017 l Total of lines 3a through e 1 Total of lines 3a through e 2 Applied to durishributions for 2019 from Part XII, Ine 4: ▶ \$ 382,160. a 3 Applied to 2018, but not more than line 2a 3 Applied to 2018, but not more than line 2a 3 Applied to 2018, but not more than line 2a 3 Applied to 2018, but not more than line 2a 4 Applied to 2018 durishributions out of corpus (Election required - see instructions) 0.  1 Treated as distributions out of corpus (Election required - see instructions) 0.  2 Applied to 2018 durishributions amount 0 Remaining amount distributed out of corpus 0. 0 Seems distributions amount 0 Seems distributions 0 Seems						
d From 2018	_	-				
e From 2018  1 Total of lines 3 through e  4 Cualifying distributions for 2019 from Part XII, line 4* ► ► \$ 382,160.  a Applied to undistributed income of prior years (Election required - see instructions)  6. Treated as distributions out of corpus (Election required - see instructions)  7. Treated as distributions out of corpus (Election required - see instructions)  8. Applied to 2018 distributible amount  8. Remaining amount distributed out of corpus 9. Crease dischibution accurative applies amount  9. Applied to 2018 distributible amount  9. Crease dischibution accurative applies amount  9. Crease dischibution accurative accuration  9. Crease dischibution accurative accuration  9. Crease dischibution accurative accuration  9. Crease dischibutions accurative from 2014  10. Crease dischibutions accurative from 2014  10. Crease dischibutions accuration from 82  10. Crease dischibution from 8	_	<del></del>				
Total of lines 3a through e	-	<del></del>				
4 Qualifying distributions for 2019 from Part XI, line 4 ► \$ 382,160. a Applied to Undistributed income of prory years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2019 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryone register to \$170. distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryone register to \$170. distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryone register to \$170. distributable amount e Remaining amount of stributed out of corpus 5 Excess distributions carryone register to \$170. distributed income register to \$170. distributed income register to \$170. distributed income substrate in the Section 4942(a) tax has been section as the section 4942(a) tax has been previously assessed 6 deficiency has been register to the section 4942(a) tax has been previously assessed 6 deficiency has been register to the section 4942(a) tax has been previously assessed 6 deficiency has been register to the section 4942(a) tax has been previously assessed 6 deficiency has been register to the section 4942(a) tax has been previously assessed 6 deficiency has been register to the section 4942(a) tax has been previously assessed 6 deficiency has been register to the section 4942(a) tax has been previously assessed 6 deficiency has been previously assessed 6 deficienc			<u> </u>			
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section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)  8 Excess distributions carryover from 2014 not applied on line 5 or line 7  9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9: a Excess from 2015 b Excess from 2016 c Excess from 2017 d Excess from 2018	7	Amounts treated as distributions out of				
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0 Analysis of line 9: a Excess from 2015 b Excess from 2016 c Excess from 2017 d Excess from 2018	9		0.			
a Excess from 2015 b Excess from 2016 c Excess from 2017 d Excess from 2018	0	l l	33	···		
b Excess from 2016 c Excess from 2017 d Excess from 2018		· I				
c Excess from 2017 d Excess from 2018						j
d Excess from 2018					ļ	Ì
					İ	

923581 12-17-19

Form **990-PF** (2019)

## JOHN & CAROLYN PETERSON CHARITABLE

Fqrm 990-PF (2019) <b>FOUNDAT</b>	ION INC.			43-19	974269 Page 10
Part XIV Private Operating F	oundations (see\in	structions and Part VII	A, question 9)	N/A	
1 a If the foundation has received a ruling of	or determination letter tha	tyt is a private operating			
foundation, and the ruling is effective fo	or 2019, enter the date of	the culing	▶ ∟		
<b>b</b> Check box to indicate whether the found		ng foundation described ii		4942(j)(3) or4	1942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2019	<b>(b)</b> 2018	(c) 2017	(d) 2016	(e) Total
investment return from Part X for					
each year listed					
<b>b</b> 85% of line 2a					
<ul> <li>Qualifying distributions from Part XII,</li> </ul>					
line 4, for each year listed		\\	<u> </u>	<del> </del>	<b>/</b>
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities				<del>  /                                   </del>	<del>-</del>
e Qualifying distributions made directly					
for active conduct of exempt activities.			\	1	
Subtract line 2d from line 2c  3 Complete 3a, b, or c for the			X		
alternative test relied upon:			/ \		
a "Assets" alternative test - enter:				\	
(1) Value of all assets		1"	/		
(2) Value of assets qualifying		/			
under section 4942(j)(3)(B)(i)		<del> /</del>		<del>                                     </del>	<del>-</del>
b "Endowment" alternative test - enter 2/3 of minimum investment return					
shown in Part X, line 6, for each year					
listed	-			<del>  \ \</del>	
c "Support" alternative test - enter:	/	1			
(1) Total support other than gross investment income (interest,					\
dividends, rents, payments on					
securities loans (section					
512(a)(5)), or royalties)		-			<del>                                     </del>
(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					<del></del>
Part XV   Supplementary Info	rmation (Comple	te this part only if	the foundation	had \$5.000 or mo	re in assets
at any time during t				40,000 0	
1 Information Regarding Foundation		•			
a List any managers of the foundation wh	-	than 2% of the total contr	ihiitions received by the	foundation before the clo-	se of any tay
year (but only if they have contributed r			ibulions received by the	Touridation before the cio	se or any tax
NONE	, .				
b List any managers of the foundation wh	n own 10% or more of th	e stock of a corporation (c	or an equally large portion	on of the ownership of a n	artnership or
other entity) of which the foundation ha			or an oquany large perm	on or and owner ormp or a p	ar trial or ap
NONE					
2 Information Regarding Contributi	ion, Grant, Gift, Loan,	Scholarship, etc., Pro	ograms:	· · · · · · · · · · · · · · · · · · ·	<del></del>
Check here ► X if the foundation of				not accept unsolicited requ	ests for funds. If
the foundation makes gifts, grants, etc.,					
a The name, address, and telephone num	ber or email address of th	e person to whom applica	tions should be address	sed:	
,,,				•	
b The form in which applications should b	e submitted and informat	tion and materials they sh	ould include:		
		•			
c Any submission deadlines:					
d Any restrictions or limitations on award	s, such as by geographica	al areas, charitable fields. I	kinds of institutions, or o	other factors:	7
	, , , , , , , , , , , , , , , , , , , ,		,		
923601 12-17-19				• • =	Form <b>990-PF</b> (2019)

Form 990-PF (2019) FOUNDATION INC.

[Part XV] Supplementary Information (continued)

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3 Grants and Contributions Paid During the		Payment	<del></del>	
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	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		···
Paid during the year		1		
	l.o.m		L	
	NONE	PC	CIVIL RIGHTS	
DENVER, CO 80203				4,50
				<del></del>
BIRCH CREEK	NONE	PC	FOUNDATION SCHOLARSHIP	
P.O. BOX 230				
EGG HARBOR, WI 54209		<del> </del>	<del> </del>	30,00
CUART ECTION CTAGE COMPANY	YOUT		DEPENDATIVE ADMC	
	NONE	PC	PERFORMING ARTS	
MT PLEASANT, SC 29464			1	35,00
CHIPS HEALTH & WELLNESS CTR	NONE	₽C	INDIVIDUAL WELLNESS	
2431 N. GRAND BLVD			,	
ST LOUIS, MO 63106		<del> </del>		1,000
	NONE	PC	EDUCATION	
ST LOUIS, MO 63138				5,000
Total SEE C	ONTINUATION SHEE	T(S)	<b>▶</b> 3a	375,330
b Approved for future payment				
NONE				
	3			
· · · · · · · · · · · · · · · · · · ·				
CCH CREEK D. BOX 230 S HARBOR, WI 54209  ARLESTON STAGE COMPANY D JOHNNIE DODDS BLVD PLEASANT, SC 29464  PES HEALTH & WELLNESS CTR IN. GRAND BLVD LOUIS, NO 63106  MUNITY ARTS ST LOUIS B DELOR ST LOUIS, MO 63138  Total  Approved for future payment  NONE  PC FOUNDATION SCHOLARSHIP PC FERFORMING ARTS  INDIVIDUAL WELLNESS  INDIVIDUAL WELLNESS  FOUNDATION SCHOLARSHIP PC FERFORMING ARTS FERFORMING ARTS  PC INDIVIDUAL WELLNESS  INDI				
IVIdI	··· <u>-</u>			

3 Grants and Contributions Paid During the	Year (Continuation)			
Recipient	If recipient is an individual,		D	
Name and address (home or business)	show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		···-
CONSERVATION COLORADO	NONE	PC	CONSERVATION	
1536 WYNKOOP ST. #510			PROGRAMMING	
DENVER, CO 80202				4,50
CULTURAL LEADERSHIP	NONE	PC	CULTURAL TRAINING	
225 S. MERAMAC STE 107				
ST. LOUIS, MO 63015				6,00
JENKINS FAMILY FOUNDATION	NONE	₽C	CITIZENS FOR	
25 GLENDALE RD			PROSPERITY	
DURANT, MS 39063	· · · · · · · · · · · · · · · · · · ·			2,00
LOWCOUNTRY FOOD BANK	NONE	₽C	FOOD BANK	
2864 AZALEA DR				
NORTH CHARLESTON, SC 29405				9,00
MADISON JAZZ CONSORTIUM	NONE	PC	SUSTAIN CURRENT	
318 ELMSIDE BOULEVARD			PROGRAMS AND LAUNCH	
MADISON, WI 53704			NEW INITIATIVES	35,00
MADISON OPERA, INC	NONE	PC	OPERA IN THE PARK	
3414 MONROE STREET			İ	
MADISON, WI 53711				30,00
MADISON SYMPHONY ORCHESTRA	NONE	PC	UP CLOSE AND MUSICAL -	
222 W. WASHINGTON AVE.			SYMPHONY SOUP	
MADISON, WI 53703				20,00
PRISON PERFORMING ARTS	NONE	₽C	PROGRAM FUNDING	
3547 OLIVE ST., STE 250				
ST. LOUIS, MO 63103				20,00
SEA ISLAND HUNGER AWARENESS	NONE	PC	WATER WELLNESS	
PO BOX 268			1	
JOHNS ISLAND, SC 29457				9,00
			.	
ST, LOUIS ARTWORKS 2703 N. 14TH ST.	NONE	PC	SUMMER PROGRAM	
ST LOUIS, MO 63106				20,00
Total from continuation sheets			<u> </u>	299,83

3 Grants and Contributions Paid During the	Year (Continuation)	_		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	Contribution	
ST. LOUIS ZOO	NONE	PC	WILDLIFE CONSERVATION	
1 GOVERNMENT DR.				
ST. LOUIS, MO 63110				10,00
TANDEM PRESS	NONE	PC	PROGRAM SPONSORSHIP	
1743 COMMERCIAL AVE		1		05.00
MADISON, WI 53704				25,000
THE SEASIDE SCHOOL FOUNDATION, INC	NONE	PF	EDUCATION PROGRAMS	
PO BOX 4610				
SANTA ROSA BEACH, FL 32459				5,000
			,	
UNIVERSITY OF WISCONSIN FOUNDATION	NONE	₽F	TEACHING ASST JAZZ	
1848 UNIVERSITY AVENUE MADISON, WI 53726			DEPT	25,000
				23,000
WILDLIFE IN NEED CENTER	NONE	PC	WILDIFE REHABILITATION	
W349 S1480 S WATERVILLE ROAD				
OCONOMOWOC, WI 53066				11,330
WISCONSIN CONSERVATORY OF MUSIC	NONE	₽C	SUPPORT OF JAZZ	
1584 N. PROSPECT AVE	HONE	<b>[</b>	INSTITUTE	
MILWAUKEE, WI 53202				25,000
WISCONSIN PUBLIC TELEVISION	NONE	PC	COLLABORATE TO RECORD	
821 UNIVERSITY AVE. MADISON, WI 53701			AND BROADCAST TWO	15 000
MADISON, WI 33701			TELEVISION PROGRAMS	15,000
WISCONSIN YOUTH SYMPHONY ORCHESTRA	NONE	₽C	PROGRAM SPONSORSHIP	
PO BOX 258039				
MADISON, WI 53725	<del>-</del>	-		10,000
ZOOLOGICAL SOCIETY OF MILWAUKEE	NONE	₽C	WILDLIFE CONSERVATION	
10005 W BLUEMOUND RD			CONSERVATION	
MILWAUKEE, WI 53226				18,000
Total from continuation sheets		<u> </u>		

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Enter gross amounts unless otherwise indicated.	Unrelated	business income		y section 512, 513, or 514	(e)
·	(a) Business	( <b>b)</b> Amount	Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue:	code	, initiality	code	Amount	Tunction income
a	<del></del>		+ +		<del></del>
b	<del>-</del>		+ +	+	
<u> </u>			+ +		
d	1		1		<del></del>
e		<u>-</u>	+ + -		
	_		+ + -		
g Fees and contracts from government agencies  2 Membership dues and assessments			++		
3 Interest on savings and temporary cash	_	· - · · · · · · · · · · · · · · · · · ·	T		
investments					
4 Dividends and interest from securities	1		14	204,906.	
5 Net rental income or (loss) from real estate:			+	201/3001	
a Debt-financed property			<del>  </del>		
b Not debt-financed property					
6 Net rental income or (loss) from personal	-		†		
property				ŀ	
7 Other investment income					
8 Gain or (loss) from sales of assets other			<del>                                     </del>		
than inventory			18	-2,942.	
9 Net income or (loss) from special events		<u> </u>	<del>  -  </del>	_,,	
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:			1 1 "		-
a				}	
	_ <del>                                    </del>		1		
u			<del></del>		
			1 1		
С					
c d					
cd		0		201,964.	0.
c d e 12 Subtotal. Add columns (b), (d), and (e)		0.		201,964.	224
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e)		0.	•		0. 201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.	.)			13	0. 201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e)	.)			13	0. 201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.
c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.  Part XVI-B Relationship of Activities  Line No. Explain below how each activity for which in	s to the Accor	nplishment of Ex	empt Pu	rposes	201,964.

Form **990-PF** (2019)

923621 12-17-19

Fgrm 990-Pi		& CAROLYN PETE ATION INC.	GRSON CHARITABL	Е 43-197	11269	D.	age <b>13</b>
Part XV		egarding Transfers to	and Transactions and	d Relationships With Nonchar			ige 13
1 Did the			owing with any other organization	described in section 501(c)		Yes	No
	•	, , , ,	ating to political organizations?				
a Transf	ers from the reporting founda	ation to a noncharitable exempt	t organization of:				
(1) Ca	ash				1a(1)		Х
(2) 01	ther assets				1a(2)		X
<b>b</b> Other t	transactions:						
(1) Sa	ales of assets to a noncharital	ble exempt organization			1b(1)		X
		ncharitable exempt organization	n		1b(2)		X
	ental of facilities, equipment,	or other assets			1b(3)		X
	eimbursement arrangements				1b(4)		X
	oans or loan guarantees		ind		1b(5)		X
		mbership or fundraising solicit			1b(6)	-	X
	•	iling lists, other assets, or paid		ays show the fair market value of the goods,	10	1	
or serv	vices given by the reporting fo		ceived less than fair market value	in any transaction or sharing arrangement,			
(a) Line no	(b) Amount involved		able exempt organization	(d) Description of transfers, transactions, and	sharing arr	angeme	its
		N/2	A				
	·						
				+			
<del></del>							
ın sect	•	n 501(c)(3)) or in section 527?	one or more tax-exempt organiza	ations described [	Yes	X	No
u ii res,	(a) Name of org		(b) Type of organization	(c) Description of relations	ship		
	N/A		(-) . ) p = 1 / 0 / g =	(-)	· F		
			1				
	<del></del>		<del></del>				

May the IRS discuss this return with the preparer shown below? See instr

X Yes

P01233761

Firm's EIN ► 41-0746749

Phone no. 262-567-6540

Sign Here

Paid

**Preparer** 

**Use Only** 

Preparer's signature

KIM MATTILA KASTE

mined this return, including accompanying schedules and statements, and to the best of my knowledge

ormation of which prepare has any knowledge ASU

DIRECTOR/TREASU

Check \_\_\_\_\_ if self- employed

RER

07/01/20

Title

Date

Signature of officer or rustee

rınt/Type preparer's name

KIM MATTILA KASTEN

Firm's name ► CLIFTONLARSONALLEN LLP

Firm's address ► 1040 OCONOMOWOC PARKWAY

OCONOMOWOC, WI 53066

FORM 990-PF DIVID	ENDS	AND IN	TERE	EST	FROM SECU	RITIES	S S	PATEMENT 1
GROSS SOURCE AMOUNT		CAPI GAI DIVID	NS	5	(A) REVENUE PER BOOKS		(B) INVEST-	(C) ADJUSTED NET INCOME
MORGAN STANLEY 204,	906.	. 0		204,906.		204,906.		0.
TO PART I, LINE 4 204,	906.		0	 o. <del></del> =	204,906	2	204,906.	0.
FORM 990-PF	<del></del>	ACCOU	NTIN	NG F	FEES		Si	PATEMENT 2
DESCRIPTION		(A) EXPENSE PER BOO			(B) TINVEST- NT INCOME	ADJ	C) USTED INCOME	(D) CHARITABLE PURPOSES
WKMR TAX PREPARATION FEES		5,1	60.		2,580.		0.	2,580.
TO FORM 990-PF, PG 1, LN 10	БВ 	5,1	60.		2,580.		0.	2,580.
FORM 990-PF	ОТН	HER PRO	FESS	SION	NAL FEES		Si	PATEMENT 3
FORM 990-PF DESCRIPTION	E	IER PRO (A) EXPENSE PER BOO	:s	NET	(B) INVEST-	ADJ	C) USTED INCOME	CATEMENT 3  (D)  CHARITABLE  PURPOSES
	E	(A) EXPENSE	S S S S S	NET	(B) INVEST-	ADJ	C) USTED	(D) CHARITABLE
DESCRIPTION  MORGAN STANLEY, MANAGEMENT	E	(A) EXPENSE PER BOO	S KS 99.	NET	(B) INVEST- IT INCOME	ADJ	C) USTED INCOME	(D) CHARITABLE PURPOSES
DESCRIPTION  MORGAN STANLEY, MANAGEMENT FEES  TO FORM 990-PF, PG 1, LN 16	E	(A) EXPENSE PER BOO 49,4	99.	NET MEN	(B) INVEST- IT INCOME 49,499.	ADJ	C) USTED INCOME  0.	(D) CHARITABLE PURPOSES  0.
DESCRIPTION  MORGAN STANLEY, MANAGEMENT FEES	E	(A) EXPENSE PER BOO 49,4	S KS 99.	NET MEN	(B) INVEST- IT INCOME 49,499.	ADJ	C) USTED INCOME  0.	(D) CHARITABLE PURPOSES  0.
DESCRIPTION  MORGAN STANLEY, MANAGEMENT FEES  TO FORM 990-PF, PG 1, LN 16	5C	(A) EXPENSE PER BOO 49,4	99. 99. TAXE	NET MEN	(B) INVEST- IT INCOME 49,499.	ADJ NET	C) USTED INCOME  0.	(D) CHARITABLE PURPOSES  0.
DESCRIPTION  MORGAN STANLEY, MANAGEMENT FEES  TO FORM 990-PF, PG 1, LN 16	5C	(A) EXPENSE PER BOO  49,4  49,4  (A) EXPENSE	99. 99. TAXE	NET MEN	(B) TINVEST- IT INCOME  49,499.  49,499.	ADJ NET	C) USTED INCOME  0.  0.  ST  C) USTED	(D) CHARITABLE PURPOSES  0.  0.  CATEMENT 4  (D) CHARITABLE

FORM 990-PF U.S. AND STATE	/CITY GOVE	RNMENT	OBLIGATIONS	STATEMENT 5
DESCRIPTION		OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S AND STATE GOVERNMENT OBLIGATIONS OVERRIDE	X		68,461.	71,736.
TOTAL U.S. GOVERNMENT OBLIGATIONS		_	68,461.	71,736.
TOTAL STATE AND MUNICIPAL GOVERNM	ENT OBLIGA	TIONS		
TOTAL TO FORM 990-PF, PART II, LI	NE 10A	=	68,461.	71,736.
FORM 990-PF C	ORPORATE S	тоск		STATEMENT 6
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK OVERRIDE		_	3,197,211.	7,062,912
TOTAL TO FORM 990-PF, PART II, LI	NE 10B	=	3,197,211.	7,062,912.
	ORPORATE B	ONDS		STATEMENT 7
DESCRIPTION	,		BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS OVERRIDE	r	_	774,191.	805,332.
TOTAL TO FORM 990-PF, PART II, LI	NE 10C	_	774,191.	805,332.
		=		

	IST OF OFFICERS, DOIND FOUNDATION MANAGE	STATEMENT 8		
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	
MARK L. PETERSON PO BOX 1507 BROOKFIELD, WI 53005	DIR/VICE PRES	0.	0.	0
ELINOR GUZNICZAK PO BOX 1507 BROOKFIELD, WI 53005	DIR/PRESIDENT 1.00	0.	0.	0 .
MICHAEL J. GUZNICZAK PO BOX 1507 BROOKFIELD, WI 53005	DIR/TREASURER 5.00	8,500.	0.	0 .
RYIA R. PETERSON PO BOX 1507 BROOKFIELD, WI 53005	DIR/SECRETARY 1.00	0.	0.	0.
EMILY C. GUZNICZAK PO BOX 1507 BROOKFIELD, WI 53005	DIRECTOR 1.00	0.	. 0.	0.
LAUREN A. GUZNICZAK PO BOX 1507 BROOKFIELD, WI 53005	DIRECTOR 1.00	0.	0.	0.
JAKE PETERSON PO BOX 1507 BROOKFIELD, WI 53005	DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE	6, PART VIII	8,500.	0.	0.