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

2008Department of the Treasury
Internal Revenue Service (77)

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2008, or tax year beginning 12/01, 2008, and ending 11/30, 2009

G Check all that apply Initial return ☐ Final return ☐ Amended return ☒ Address change ☐ Name change ☐Use the
IRS label.
Otherwise,
print
or type
See Specific
InstructionsWHEELER FOUNDATION
2617 OLYMPUS DR
SALT LAKE CITY, UT 84124

A Employer identification number

87-0503163

B Telephone number (see the instructions)

801-908-4343

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)

▶ \$ 2,904,299.

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____

(Part I, column (d) must be on cash basis)

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

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE

1 Contributions, gifts, grants, etc. received (att sch)

200,000.

2 Ck ☐ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

54,279.

54,279.

4 Dividends and interest from securities

18,571.

18,571.

5a Gross rents

b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

-92,050.

b Gross sales price for all assets on line 6a 103,668.

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

b Less Cost of goods sold

c Gross profit/(loss) (att sch)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

180,800.

72,850.

0.

ADMINISTRATIVE AND OPERATING EXPENSES

13 Compensation of officers, directors, trustees, etc.

5,000.

2,500.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch) See St 1

469.

469.

c Other prof fees (attach sch) See St 2

6,423.

6,423.

17 Interest

18 Taxes (attach schedule) See Stmt 3

4,117.

1,117.

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 4

7.

7.

24 Total operating and administrative expenses. Add lines 13 through 23

16,016.

10,040.

476.

25 Contributions, gifts, grants paid Stmt 5

152,500.

152,500.

26 Total expenses and disbursements. Add lines 24 and 25

168,516.

10,040.

0.

152,976.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

12,284.

b Net investment income (if negative, enter -0-)

62,810.

c Adjusted net income (if negative enter -0-)

0.

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash – non-interest-bearing	28,953.	67,977.	67,977.
	2 Savings and temporary cash investments	2,036,101.	2,090,034.	2,090,034.
	3 Accounts receivable			
	Less allowance for doubtful accounts			
	4 Pledges receivable			
	Less allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	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) Statement 6	984,901.	904,228.	746,288.
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis			
Less accumulated depreciation (attach schedule)				
12 Investments – mortgage loans				
13 Investments – other (attach schedule)				
14 Land, buildings, and equipment basis				
Less accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers – see instructions Also, see page 1, item I)	3,049,955.	3,062,239.	2,904,299.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
NET FUND ASSETS OR BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ☒			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	3,049,955.	3,062,239.	
	30 Total net assets or fund balances (see the instructions)	3,049,955.	3,062,239.	
	31 Total liabilities and net assets/fund balances (see the instructions)	3,049,955.	3,062,239.	

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	3,049,955.
2 Enter amount from Part I, line 27a	2	12,284.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	3,062,239.
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	3,062,239.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)

(b) How acquired
P — Purchase
D — Donation(c) Date acquired
(month, day, year)(d) Date sold
(month, day, year)

1 a CREDIT SUISSE STMT	P	Various	Various
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 103,668.		195,718.	-92,050.
b			
c			
d			
e			

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

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			-92,050.
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	-92,050.
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 the instructions) If (loss), enter -0- in Part I, line 8	3	0.

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 the 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 (column (b) divided by column (c))
2007	136,562.	2,985,785.	0.045737
2006	83,942.	2,998,411.	0.027995
2005	72,007.	2,031,032.	0.035453
2004	67,500.	2,025,009.	0.033333
2003	97,701.	2,072,303.	0.047146

2 Total of line 1, column (d)	2	0.189664
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.037993
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	2,745,950.
5 Multiply line 4 by line 3	5	104,162.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	628.
7 Add lines 5 and 6	7	104,790.
8 Enter qualifying distributions from Part XII, line 4	8	152,976.

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 the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1 Date of ruling letter: _____ (attach copy of ruling letter if necessary – see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	628.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 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	628.
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	628.
6 Credits/Payments:			
a 2008 estimated tax prmts and 2007 overpayment credited to 2008	6a	7,103.	
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	7	7,103.	
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	6,475.	
11 Enter the amount of line 10 to be Credited to 2009 estimated tax 6,475. Refunded	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		X
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		
c Did the foundation file Form 1120-POL for this year?		X
d 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 \$ 0.		
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		X
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		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) UT		
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	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 calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>R D DAVIS JR</u> Telephone no <u>801 278 8987</u> Located at <u>2177 E NETTIES PL. SALT LAKE CITY UT</u> ZIP + 4 <u>84124</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	<u>N/A</u>		

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
1 a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No	
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1 b	N/A
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 2008?	1 c	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))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	☐ Yes ☒ No	
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 the instructions)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If 'Yes,' did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4 b	X

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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 509(a)(1), (2), or (3), or section 4940(d)(2)? (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 N/A

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?N/A ☐ 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 X

If you answered 'Yes' to 6b, also 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 N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 7		5,000.	0.	0.

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

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

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

0

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	643,260.
b Average of monthly cash balances	1b	2,144,507.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	2,787,767.
e 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	2,787,767.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	41,817.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,745,950.
6 Minimum investment return. Enter 5% of line 5	6	137,298.

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	137,298.
2a Tax on investment income for 2008 from Part VI, line 5	2a	628.	
b Income tax for 2008 (This does not include the tax from Part VI)	2b		
c Add lines 2a and 2b	2c	628.	
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	136,670.	
4 Recoveries of amounts treated as qualifying distributions	4		
5 Add lines 3 and 4	5	136,670.	
6 Deduction from distributable amount (see instructions)	6		
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	136,670.	

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	152,976.
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	152,976.
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	628.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	152,348.

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 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				136,670.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 152,976.				
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2008 distributable amount				136,670.
e Remaining amount distributed out of corpus	16,306.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	16,306.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	16,306.			
10 Analysis of line 9				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008	16,306.			

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
Total			3 a	
<i>b Approved for future payment</i>				
Total			3 b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion 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		54,279.	14		
4	Dividends and interest from securities		18,571.	14		
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					-92,050.
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		72,850.			-92,050.
13	Total. Add line 12, columns (b), (d), and (e)				13	-19,200.

(See worksheet in the instructions for line 13 to verify calculations)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ and 990-PF**
▶ **See separate instructions.**

OMB No 1545 0047

2008

Name of the organization

WHEELER FOUNDATION

Employer identification number

87-0503163

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 501(c)(____) (enter number) organization
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule** (**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.)

General Rule –

- ☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules –

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the Parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$ _____

Caution: Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF) but they **must** answer 'No' on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

WHEELER FOUNDATION

87-0503163

Part I Contributors (see instructions)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	DON M WHEELER 2617 OLYMPUS DR SALT LAKE CITY, UT 84124	\$ 200,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization

WHEELER FOUNDATION

Employer identification number

87-0503163

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

BAA

Name of organization

Employer identification number

WHEELER FOUNDATION

87-0503163

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete cols (a) through (e) and the following line entry)For organizations completing Part III, enter total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year (Enter this information once — see instructions)

► \$ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

WHEELER FOUNDATION

87-0503163

Statement 1
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
KESLER &RUST	\$ 69.			\$ 69.
PARSELL ACCOUNTING	400.			400.
Total	<u>\$ 469.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 469.</u>

Statement 2
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
CREDIT SUISSE	\$ 6,423.	\$ 6,423.		
Total	<u>\$ 6,423.</u>	<u>\$ 6,423.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 3
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
EXCISE TAX	\$ 3,000.			
FOREIGN INCOME TAX	1,117.	\$ 1,117.		
Total	<u>\$ 4,117.</u>	<u>\$ 1,117.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 4
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
POSTAGE	\$ 7.			\$ 7.
Total	<u>\$ 7.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 7.</u>

WHEELER FOUNDATION

87-0503163

Statement 5
Form 990-PF, Part I, Line 25
Contributions, Gifts, and Grants

Cash Grants and Allocations

Class of Activity:

Donee's Name:

SCHEDULE ATTACHED

Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given: \$ 152,500.

Total \$ 152,500.

Statement 6
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

<u>Corporate Stocks</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
CORPORATE LISTED STOCK	Mkt Val	\$ 904,228.	\$ 746,288.
	Total	<u>\$ 904,228.</u>	<u>\$ 746,288.</u>

Statement 7
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted</u>	<u>Compensation</u>	<u>Contri- bution to EBP & DC</u>	<u>Expense Account/ Other</u>
DON M WHEELER 4899 WEST 2100 SO SALT LAKE CITY, UT 84120	President & CEO 1.00	\$ 0.	\$ 0.	\$ 0.
ROBERT D DAVIS JR 2177 E NETTIES PL. SALT LAKE CITY, UT 84124	Treasurer 3.00	5,000.	0.	0.
SUSAN HOLT 984 DONNER WAY SALT LAKE CITY, UT 84108	Director 1.00	0.	0.	0.
ALISON W JENSEN 6261 VINECREST DR SALT LAKE CITY, UT 84121	Director 0	0.	0.	0.
REBECCA DAVIS 11396 NEW RIDGE RD PORTLAND, OR 97229	Director 1.00	0.	0.	0.

WHEELER FOUNDATION

87-0503163

Statement 7 (continued)
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted</u>	<u>Compensation</u>	<u>Contri- bution to EBP & DC</u>	<u>Expense Account/ Other</u>
KATHY YOUNKER 1029 SO 1200 E SALT LAKE CITY, UT 84105	Director 1.00	\$ 0.	\$ 0.	\$ 0.
CONNIE WHEELER 3035 ABELL AVE BALTIMORE, MD 21218	Director 1.00	0.	0.	0.
THOMAS CLARK 4899 W 2100 SO SALT LAKE CITY, UT 84120	Secretary 1.00	0.	0.	0.
Total		\$ 5,000.	\$ 0.	\$ 0.

Statement 8
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program: WHEELER FOUNDATION
Name: DON M WHEELER
Care Of: P O BOX 701017
Street Address:
City, State, Zip Code: WEST VALLEY CITY, UT 84107
Telephone: 801-975-1941
Form and Content: BY WRITTEN REQUEST
Submission Deadlines: NINE
Restrictions on Awards: NONE

WHEELER FOUNDATION
ATTACHMENT TO PART XV
87-0503163
11-30-09

RECIPIENT NAME & ADDRESS	IF RECIPIENT IS AN INDIV SHOW RELATIONSHIP TO FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ALZHEIMER'S ASSOCIATION 855 E 4800 SO, SUITE 100 SALT LAKE CITY, UT 84107	THERE ARE NO RELATIONSHIPS TO ANY MANAGER OR SUBSTANTIAL CONTRIBUTOR FOR ANY OF THE FOLLOWING RECIPIENTS	PUBLIC	THERE IS NO SPECIFIC PURPOSE FOR ANY OF THE FOLLOWING DISBURSEMENTS ALL CONTRIBUTION ARE UN- RESTRICTED AND ARE MEANT FOR USE IN THE ENTITIES EXEMPT PURPOSE, AT THEIR DISCRETION	3,000
AMERICAN INDIAN SERVICES 1902 NORTH CANYON ROAD #100 PROVO, UT 84604		PUBLIC		2,000
ASSISTANCE LEAGUE OF SALT LAKE P O BOX 9353 SALT LAKE CITY, UT 84109		PUBLIC		1,000
UTAH PARENT CENTER - AUTISTIC 2290 E 4500 SO #110 SALT LAKE CITY, UT 84117		PUBLIC		1,500
BABCOCK THEATER U OF U 540 ARAPEEN DR #250 SALT LAKE CITY, UT 84108		PUBLIC		1,000
BOYS SCOUTS S L COUNCIL 525 FOOTHILL BLVD SALT LAKE CITY, UT 84113		PUBLIC		1,000
BOY AND GIRLS CLUB OF SOUTH VALLEY P O BOX 57071 MURRAY, UT 84157		PUBLIC		2,000
BOY AND GIRLS CLUB OF GREATER SALT LAKE 669 SO 200 E #100 SALT LAKE CITY, UT 84117		PUBLIC		2,000
AMERICAN CANCER SOCIETY OF UTAH P O BOX 581099 SALT LAKE CITY, UT 84158		PUBLIC		2,000
CHILDREN'S THEATER 237 SO STATE ST SALT LAKE CITY, UT 84111		PUBLIC		1,500
CROSSROADS URBAN CENTER 347 SOUTH 400 EAST SALT LAKE CITY, UT 84111		PUBLIC		1,000
DAVIS EDUCATION FOUNDATION P O BOX 588 FARMINGTON, UT 84025		PUBLIC		1,000
DIXIE COLLEGE 225 SOUTH 700 EAST ST GEORGE, UT 84770		PUBLIC		2,000
UTAH AFTERSCHOOL NETWORK 254 SOUTH 600 EAST #200 SALT LAKE CITY, UT 84102		PUBLIC		1,000

WHEELER FOUNDATION

ATTACHMENT TO PART XV

87-0503163

11-30-09

RECIPIENT NAME & ADDRESS	IF RECIPIENT IS AN INDIV SHOW RELATIONSHIP TO FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
DOERNBECHER CHILDREN'S HOSPITAL 1121 S W SALMON ST #201 PORTLAND, OR 97205		PUBLIC		2,000
EARTH SCIENCES EDUCATION 30 U STREET SALT LAKE CITY, UT 84103		PUBLIC		1,000
ENABLE INDUSTRIES 2640 INDUSTRIAL DRIVE OGDEN, UT 84401		PUBLIC		2,000
GINA BACHAUER INTERNATIONAL PIANO FOUNDATION 138 W BROADWAY #220 SALT LAKE CITY, UT 84101		PUBLIC		1,000
GRANITE EDUCATION FOUNDATION 450 E 3700 SO SALT LAKE CITY, UT 84115		PUBLIC		1,000
GUADALUPE SCHOOLS 340 SOUTH DOSHEN STREET SALT LAKE CITY, UT 84104		PUBLIC		1,000
HALE CENTER THEATRE 3333 SO DECKER LAKE DR WEST VALLEY CITY, UT 84119		PUBLIC		5,000
JORDAN EDUCATION FOUNDATION 9361 SO 300 E SANDY, UT 84070		PUBLIC		1,000
JUAN DIEGO HIGH SCHOOL 300 EAST 11800 SOUTH DRAPER, UT 84020		PUBLIC		1,000
MT STATES LEGAL FOUNDATION 2296 SOUTH LEWIS WAY LAKEWOOD, CO 80227		PUBLIC		2,000

WHEELER FOUNDATION
ATTACHMENT TO PART XV
87-0503163
11-30-09

RECIPIENT NAME & ADDRESS	IF RECIPIENT IS AN INDIV SHOW RELATIONSHIP TO FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MULTIPLE SCLEROSIS 6364 SO HIGHLAND DR #101 SALT LAKE CITY, UT 84121		PUBLIC		2,000
MEDICAL TEAMS INTERNATIONAL PO BOX 10 PORTLAND, OR 97207-0010		PUBLIC		2,000
OGDEN NATURE CENTER 966 WEST 12TH STREET OGDEN, UT 84404		PUBLIC		1,000
OREGON FOOD BANK PO BOX 55370 PORTLAND, OR 97238		PUBLIC		2,000
OUESLESBOUGOU 10 WEST 100 SOUTH #605 SALT LAKE CITY, UT 84101		PUBLIC		1,000
PIONEER THEATRE COMPANY 300 SOUTH 1400 EAST, #325 SALT LAKE CITY, UT 84112		PUBLIC		2,000
FRIENDS FOR SIGHT 661 SOUTH 200 EAST SALT LAKE CITY, UT 84111		PUBLIC		1,000
PREVENT CHILD ABUSE UTAH 2955 HARRISON BLVD #104 OGDEN, UT 84403		PUBLIC		1,000
PRIMARY CHILDREN MEDICAL CENTER P O BOX 58249 SALT LAKE CITY, UT 84158		PUBLIC		2,000
AMERICAN RED CROSS 465 SO 400 E #200 SALT LAKE CITY, UT 84111		PUBLIC		1,000
SALT LAKE COMMUNITY COLLEGE FOUNDATION 4600 SOUTH REDWOOD ROAD SALT LAKE CITY, UT 84123		PUBLIC		2,000
SALT LAKE EDUCATION FOUNDATION 440 EAST 100 SOUTH SALT LAKE CITY, UT 84111		PUBLIC		1,000
SPECIAL OLYMPICS UTAH 243 E 400 SO #111 SALT LAKE CITY, UT 84111		PUBLIC		1,000

WHEELER FOUNDATION
ATTACHMENT TO PART XV
87-0503163
11-30-09

RECIPIENT NAME & ADDRESS	IF RECIPIENT IS AN INDIV SHOW RELATIONSHIP TO FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SPRINGVILLE ART MUSEUM 126 EAST 400 SOUTH SPRINGVILLE, UT 84663		PUBLIC		3,000
ST JOSEPH VILLA 451 BISHOP FEDERAL LANE SALT LAKE CITY, UT 84115		PUBLIC		5,000
THE SALVATION ARMY P O BOX 70508 SALT LAKE CITY, UT 84170		PUBLIC		1,000
THE SARAH DAFT HOME 737 SOUTH 1300 EAST SALT LAKE CITY, UT 84102		PVT OP		1,000
THIS IS THE PLACE FOUNDATION 2601 EAST SUNNYSIDE AVE SALT LAKE CITY, UT 84108		PUBLIC		3,000
TRACY AVIARY 589 EAST 1300 SOUTH SALT LAKE CITY, UT 84105		PUBLIC		2,000
TUACAHN CENTER 1100 TUACAHN DRIVE IVINS, UT 84738		PUBLIC		5,000
UNIVERSITY OF UTAH DEVELOPMENT OFFICE 540 ARAPEEN DR #250 SALT LAKE CITY, UT 84108		PUBLIC		3,000
UTAH CHILDREN 747 EAST SOUTH TEMPLE #100 SALT LAKE CITY, UT 84102		PUBLIC		1,000
UTAH FOOD BANK 1025 SOUTH 700 WEST SALT LAKE CITY, UT 84104		PUBLIC		3,500
UTAH HEART ASSOCIATION 465 SO 400 EAST SALT LAKE CITY, UT 84111		PUBLIC		2,000
UTAH HERITAGE FOUNDATION P O BOX 28 SALT LAKE CITY, UT 84110		PUBLIC		1,000

WHEELER FOUNDATION
ATTACHMENT TO PART XV
87-0503163
11-30-09

RECIPIENT NAME & ADDRESS	IF RECIPIENT IS AN INDIV SHOW RELATIONSHIP TO FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
UTAH SHAKESPEAREAN 351 WEST CENTER STREET CEDAR CITY, UT 84720		PUBLIC		5,000
UTAH SYMPHONY- UTAH OPERA 123 WEST SOUTH TEMPLE SALT LAKE CITY, UT 84104		PUBLIC		6,000
UTAH VALLEY SYMPHONY P O BOX 50118 PROVO, UTAH 84605-0118		PUBLIC		2,000
UTAH YOUTH VILLAGE 5800 SOUTH HIGHLAND DRIVE SALT LAKE CITY, UT 84121		PUBLIC		1,000
VISUAL ART INSTITUTE 1838 SOUTH 1500 EAST SALT LAKE CITY, UT 84105		PUBLIC		1,000
WESTMINSTER COLLEGE 1840 SOUTH 1300 WEST SALT LAKE CITY, UT 84105		PUBLIC		3,000
WHEELER HISTORIC FARMS 6351 SOUTH 900 EAST SALT LAKE CITY, UT 84121		PUBLIC		5,000
YWCA SALT LAKE CITY 322 EAST 300 SOUTH SALT LAKE CITY, UT 84111		PUBLIC		1,000
RIRIE - WOODBURY DANCE 138 WEST 300 SO SALT LAKE CITY, UT 84101		PUBLIC		1,000
VIRGINIA TANNER CREATIVE DANCE 1901 E SOUTH CAMPUS DR SALT LAKE CITY, UT 84112		PUBLIC		1,000
SWANER ECO CENTER P O BOX 981870 PARK CITY, UT 84098		PUBLIC		1,000
KUER - DEVELOPMENT OFFICE 540 ARAPEEN DR #250 SALT LAKE CITY, UT 84108		PUBLIC		2,000
WORK ACTIVITY CENTER 1275 W 2320 SO WEST VALLEY CITY, UT 84119		PUBLIC		2,000
YOUNKER FOUNDATION 1029 SO 1200 EAST SALT LAKE CITY, UT 84105		PUBLIC		5,000
EAST HIGH FOUNDATION 440 EAST 100 SO SALT LAKE CITY, UT 84111		PUBLIC		1,000
MARYLHURST UNIVERSITY 17600 PACIFIC HIGHWAY				5,000

WHEELER FOUNDATION
ATTACHMENT TO PART XV
87-0503163
11-30-09

RECIPIENT NAME & ADDRESS	IF RECIPIENT IS AN INDIV SHOW RELATIONSHIP TO FOUNDATION MANAGER OR SUBSTANTIAL CONTRIBUTOR	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
P O BOX 261 MARYLHURST, OR 97036		PUBLIC		
UTAH WILDLIFE CONSERVATION FOUNDATION P O BOX 169111 SALT LAKE CITY, UT 84116-6911		PUBLIC		3,000
THE ROAD HOME 210 SO RIO GRANDE ST SALT LAKE CITY, UT 84101		PUBLIC		2,000
DESERET FOUNDATION - QUILT SHOW 5121 SO COTTONWOOD DR P O BOX 577000 MURRAY, UT 84143		PUBLIC		1,000
DISCOVER GATEWAY 444 WEST 100 SOUTH SALT LAKE CITY, UT 84101		PUBLIC		3,000
LIVING PLANET AQUARIUM 725 EAST 10600 SO SANDY, UT 84094		PUBLIC		2,000
THE PINGREE CENTER CHILDREN WITH AUTISM, PPSA 780 SO GARDSMAN WAY SALT LAKE CITY, UT 84108		PUBLIC		2,000
BRIGHAM YOUNG UNIVERSITY LDS PHILANTHROPIES 206B LDSP PROVO, UT 84602		PUBLIC		2,000
AMERICAN DIABETES ASSOC TOUR DE CURE 182 SO 600 EAST #100 SALT LAKE CITY, UT 84120-8212		PUBLIC		2,000
TKJ CHARITIES 2413 ROYAL LANE SANDY, UT 84092		PUBLIC		2,500
SEGO LILY WARD LDS CHURCH C/O 10248 ASHLEY PARK DR SANDY, UT 84092		PUBLIC		2,500
TOTAL				152,500

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Type or print File by the due date for filing your return. See instructions	Name of Exempt Organization	Employer identification number
	WHEELER FOUNDATION	87-0503163
	Number, street, and room or suite number. If a P.O. box, see instructions	
	4899 WEST 2100 SOUTH	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	WEST VALLEY CITY, UT 84120-1225	

Check type of return to be filed (file a separate application for each return)

- | | | |
|---|--|------------------------------------|
| ☐ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (section 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

- The books are in the care of ► R D DAVIS JR

Telephone No ► 801 278 8987 FAX No ► 801 272 2730

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 7/15, 20 10, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ☐ calendar year 20__ or
 ► ☒ tax year beginning 12/01, 20 08, and ending 11/30, 20 09

- 2 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$ 7,000.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$ 7,000.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions**BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev 4-2009)