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Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

2009

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

For calendar year 2009, or tax year beginning , 2009, and ending , 20

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE WILLCOXON FAMILY FOUNDATION		A Employer identification number 43-1781735
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) (417) 781-5371
	City or town, state, and ZIP code Joplin, MO 64801-9547		C If exemption application is pending, check here <input type="checkbox"/> D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 256,733		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

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 page 11 of 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 (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	9,075	9,075		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10 - STM139	(50,774)			
	b Gross sales price for all assets on line 6a 181,379				
	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 or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	(41,699)	9,075			
Additional expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) - STM108				
	b Accounting fees (attach schedule) - STM109	350	350		
	c Other professional fees (attach schedule)	1,527	1,527		
	17 Interest - STM110				
	18 Taxes (attach schedule) (see page 14 of the instructions)	10	10		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	2,942	883		2,059
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	4,829	2,770		2,059
	25 Contributions, gifts, grants paid	11,851			11,851
26 Total expenses and disbursements. Add lines 24 and 25	16,680	2,770		13,910	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	(58,379)				
b Net investment income (if negative, enter -0-)		6,305			
c Adjusted net income (if negative, enter -0-)					

116 P

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
A s s e t s	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	(2,655)	2,939	
	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 page 16 of the instructions)			
	7 Other notes and loans receivable (attach schedule)			
	Less allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	500	150	150
	10a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule)	212,501	218,821	215,689
	c Investments - corporate bonds (attach schedule)			
	L i a b i l i t i e s	11 Investments - land, buildings, and equipment basis		
Less accumulated depreciation (attach schedule)				
12 Investments - mortgage loans				
13 Investments - other (attach schedule)		121,016	51,073	40,894
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 the instructions Also, see page 1, item I)		331,362	272,983	256,733
17 Accounts payable and accrued expenses				
18 Grants payable				
F u n d A s s e t s B a l a n c e s	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)		0	
	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
27 Capital stock, trust principal, or current funds				
28 Paid-in or capital surplus, or land, bldg, and equipment fund				
29 Retained earnings, accumulated income, endowment, or other funds	331,362	272,983		
30 Total net assets or fund balances (see page 17 of the instructions)	331,362	272,983		
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	331,362	272,983		

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	331,362
2 Enter amount from Part I, line 27a	2	(58,379)
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	272,983
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	272,983

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) . . . } If (loss), enter -0- in Part I, line 8 }	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see page 18 of 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 (col (b) divided by col (c))
2008	13,276	331,362	0.040065
2007	9,004	338,307	0.026615
2006	9,653	302,329	0.031929
2005	22,220	316,371	0.070234
2004	15,297	308,074	0.049654

2 Total of line 1, column (d)	2	0.218496
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	0.043699
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	231,692
5 Multiply line 4 by line 3	5	10,125
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	63
7 Add lines 5 and 6	7	10,188
8 Enter qualifying distributions from Part XII, line 4 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 on page 18	8	13,910

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/>	and enter 1% of Part I, line 27b	1	63
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2		3	63
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	63
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 150		
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	150	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	87	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax 87 Refunded	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of 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 ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		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		X
4a 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?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		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 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, col (c), and Part XV . . .	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation		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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? 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

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 page 20 of the 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?	13	X	

Website address **▶ N/A**

14 The books are in care of **▶ ROBERT L WILLCOXON** Telephone no **▶ 417-781-5371**
 Located at **▶ 1316 NORTHRIDGE TERRACE Joplin, MO** ZIP+4 **▶ 64801-9547**

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

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	1b	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ _____		
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 page 20 of the instructions)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 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 2009)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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 2009?	4b	X

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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 page 22 of the instructions)		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 page 22 of the instructions)?		5b		
Organizations relying on a current notice regarding disaster assistance check here		<input type="checkbox"/>		
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?		<input type="checkbox"/> Yes <input type="checkbox"/> 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?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		
If "Yes" to 6b, file Form 8870		<input checked="" type="checkbox"/>		
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the 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 990 OFOV				
ROBERT L WILLCOXON	PRESIDENT/DIRECTOR			
1316 NORTHRIDGE TERRACE, MO 64801-9547	1	0	0	0
DOROTHY WILLCOXON	SEC/TREAS/DIRECTOR			
1316 NORTHRIDGE TERRACE, MO 64801--954	1	0	0	0
SARA WILLCOXON TATE	DIRECTOR			
4737 SIBEL CT Powell, OH 43065-9048	0	0	0	0
PHILIP WILLCOXON	DIRECTOR			
3702 FAWN TRAIL Joplin, MO 64804	0	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions).

If none, enter "NONE."

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

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

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	▶

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	232,465
b	Average of monthly cash balances	1b	2,755
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	235,220
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	235,220
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	3,528
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	231,692
6	Minimum investment return. Enter 5% of line 5	6	11,585

Part XI Distributable Amount (see page 25 of the 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	11,585
2a	Tax on investment income for 2009 from Part VI, line 5	2a	63
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	63
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	11,522
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	11,522
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	11,522

Part XII Qualifying Distributions (see page 25 of the 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	13,910
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	13,910
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 page 26 of the instructions)	5	63
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	13,847

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				11,522
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			14,140	
b Total for prior years				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 13,910				
a Applied to 2008, but not more than line 2a . . .			13,910	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions) . . .				
d Applied to 2009 distributable amount				
e Remaining amount distributed out of corpus . . .				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 .				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions			230	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				11,522
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)**1a** If the foundation has received a ruling or determination letter that it is a private operating

foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section☐ 4942(j)(3) or☐ 4942(j)(5)**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 of the instructions.)**1 Information Regarding Foundation Managers:****a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

ROBERT WILLCOXON, DOROTHY WILLCOXON,

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.**a** The name, address, and telephone number of the person to whom applications should be addressed**b** The form in which applications should be submitted and information and materials they should include**c** Any submission deadlines**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
JOPLIN CHAMBER OF COMMERCE 320 EAST 4TH STREET Joplin MO 64801-2263		501 (C) (3)	CHARITY	1,000
FOOD 4 LESS OUTREACH HOUSE 2800 EAST 32ND STREET Joplin MO 64804-4401		501 (C) (3)	CHARITY	351
DIOCESAN DEVELOPMENT 601 S JEFFERSON Springfield MO 65806		501 (C) (3)	CHARITY	250
YOUNG LIFE 121 OLD MERAMEC STATION ROAD Ballwin MO 63021		501 (C) (3)	CHARITY	250
HEALTHY START 6400 PROSPECT SUITE 216 Kansas City MO 64132		501 (C) (3)	CHARITY	500
JOPLIN HUMANE SOCIETY 140 E EMPEROR LANE Joplin MO 64801		501 (C) (3)	CHARITY	250
INDIAN SPRINGS ELEMENTARY 50 E HENDERSON ROAD Columbus OH 43214		501 (C) (3)	CHARITY	500
CHILDREN'S HAVEN 701 PICHER Joplin MO 64801		501 (C) (3)	CHARITY	500
Total			3a	
b Approved for future payment				
Total			3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
LAWRENCE HUMANE SOCIETY 1805 E 19TH STREET Lawrence KS 66046		501 (C) (3)	CHARITY	500
RED CROSS 410 S JACKSON AVENUE Joplin MO 64801		501 (C) (3)	CHARITY	500
ST PETER'S CATHOLIC CHURCH 812 S PEARL AVENUE Joplin MO 64801		501 (C) (3)	CHARITY	6,000
TURNAROUND RANCH 3006 MCCLELLAND BLVD Joplin MO 64803		501 (C) (3)	CHARITY	250
JOPLIN PUBLIC LIBRARY 300 MAIN STREET Joplin MO 64801		501 (C) (3)	CHARITY	250
SMILE TRAIN 41 MADISON AVE 28TH FLOOR New York NY 10010		501 (C) (3)	CHARITY	250
OUR LADY OF PEACE CHURCH 20 E DOMINION BLVD Columbus OH 43214		501 (C) (3)	CHARITY	500
Total			3a	11,851
b Approved for future payment				
Total			3b	

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

Enter gross amounts unless otherwise indicated

Part XVIII Analysis of Income-Producing Activities					(e) Related or exempt function income (See page 28 of the instructions)
Enter gross amounts unless otherwise indicated					
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies . . .					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments .					
4 Dividends and interest from securities			14	9,075	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property . .					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory .			18	(50,774)	
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)				(41,699)	
13 Total. Add line 12, columns (b), (d), and (e)				13	(41,699)

(See worksheet in line 13 instructions on page 28 to verify calculations)

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

[illegible]

1 List all officers, directors, trustees, and key employees for the year even if they were not compensated.

Federal Supporting Statements

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Name(s) as shown on return

FEIN

THE WILLCOXON FAMILY FOUNDATION

43-1781735

Form 990PF, Part II, Line 13 Investments: Other Schedule

Statement #118

Category	Book value (BOY)	Book value (EOY)	FMV (EOY)
MUTUAL FUNDS	121,016	51,073	40,894
Total	121,016	51,073	40,894

Form 990PF, Part II, Line 10(b) Investments: Corporate Stock Schedule

PG 01
Statement #137

Category	BOY	Book Value	EOY FMV
STOCKS	212,501	218,821	215,689
Totals	212,501	218,821	215,689

Federal Supporting Statements**2009**

Name(s) as shown on return

FEIN

CAPITAL WORLD GROWTH INCOME FD
2007-08
PURCHASED
2009-12

\$10,995
\$
\$10,995
\$
\$15,216

Name ISHRS BARCLAYS AGGR BOND FUND
Date Acquired 2009-01
How Acquired PURCHASED
Date Sold 2009-04
Purchaser
Gross Sales \$18,771
Sales Expense \$
Total Net \$18,771
Accumulated Depreciation \$
Basis \$19,584

Name ISHRS BARCLAYS 7-10 YR TREAS
Date Acquired 2009-04
How Acquired PURCHASED
Date Sold 2009-10
Purchaser
Gross Sales \$6,129
Sales Expense \$
Total Net \$6,129
Accumulated Depreciation \$
Basis \$6,356

Name ISHRS BARCLAYS INTERM CR BD FD
Date Acquired 2009-04
How Acquired PURCHASED
Date Sold 2009-07
Purchaser
Gross Sales \$6,980
Sales Expense \$
Total Net \$6,980
Accumulated Depreciation \$
Basis \$6,653

Federal Supporting Statements

2009

Name(s) as shown on return

FEIN

ISHRS BARCLAYS 1-3 YR CR BD FD
2008-10
PURCHASED
2009-01

\$1,503
\$
\$1,503
\$
\$1,511

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS BARCLAYS 1-3 YR CR BD FD
2008-10
PURCHASED
2009-04

\$3,429
\$
\$3,429
\$
\$3,526

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS BARCLAYS 20+ YR TREAS BD
2009-04
PURCHASED
2009-10

\$8,656
\$
\$8,656
\$
\$9,549

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS IBOXX \$ YIELDEFT CORP BD
2008-10
PURCHASED
2009-10

\$10,780
\$
\$10,780
\$
\$11,095

Federal Supporting Statements**2009**

Name(s) as shown on return

FEIN

ISHRS IBOXX INV GRADE CORP BD
2009-07
PURCHASED
2009-10

\$10,597
\$
\$10,597
\$
\$10,213

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS MSCIEAFE INDEX FD
2009-01
PURCHASED
2009-04

\$2,861
\$
\$2,861
\$
\$3,132

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS S&P MIDCAP 400 VL IND FD
2008-10
PURCHASED
2009-01

\$4,302
\$
\$4,302
\$
\$5,682

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS S&P SML CAP 600 GR ID FD
2008-10
PURCHASED
2009-07

\$6,504
\$
\$6,504
\$
\$8,367

Federal Supporting Statements**2009**

Name(s) as shown on return

FEIN

ISHRS S&P SMLCAP 600 GRT IN FD
2008-10
PURCHASED
2009-10

\$5,137

\$

\$5,137

\$

\$6,553

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS S&P SMLCAP 600 VAL IN FD
2008-10
PURCHASED
2009-01

\$3,146

\$

\$3,146

\$

\$4,175

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

SPDR BARCLAYS CAP ETF HIGH YD
2008-07
PURCHASED
2009-07

\$415

\$

\$415

\$

\$519

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

SPDR BARCLAYS CAP HIGH YD BD
2008-04
PURCHASED
2009-01

\$3,186

\$

\$3,186

\$

\$4,271

Federal Supporting Statements**2009**

Name(s) as shown on return

FEIN

VANGUARD EMERGING MARKETS ETF
2009-07
PURCHASED
2009-10

\$568

\$

\$568

\$

\$489

Name VANGUARD REIT ETF
Date Acquired 2008-07
How Acquired PURCHASED
Date Sold 2009-01
Purchaser
Gross Sales \$6,073
Sales Expense \$
Total Net \$6,073
Accumulated Depreciation \$
Basis \$11,118

Name ENERGY SELECT SECTOR SPDR
Date Acquired 2008-07
How Acquired PURCHASED
Date Sold 2009-10
Purchaser
Gross Sales \$3,732
Sales Expense \$
Total Net \$3,732
Accumulated Depreciation \$
Basis \$5,356

Name ENRGY SELECT SECTOR SPDR
Date Acquired 2007-02
How Acquired PURCHASED
Date Sold 2009-01
Purchaser
Gross Sales \$249
Sales Expense \$
Total Net \$249
Accumulated Depreciation \$
Basis \$286

Federal Supporting Statements

2009

Name(s) as shown on return

FEIN

FINANCIAL SELECT SECTOR SPDR
2007-02
PURCHASED
2009-07

\$2,543

\$

\$2,543

\$

\$8,558

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

INDUSTRIAL SELECT SECTOR SPDR
2007-02
PURCHASED
2009-10

\$3,569

\$

\$3,569

\$

\$5,368

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS BARCLAYS 1-3 YR TREAS BD
2007-10
PURCHASED
2009-04

\$14,652

\$

\$14,652

\$

\$14,098

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS IBOX\$YIELDET CORP BD
2008-07
PURCHASED
2009-10

\$4,576

\$

\$4,576

\$

\$5,170

Federal Supporting Statements

2009

Name(s) as shown on return

FEIN

ISHRS MSCI EAFE IDX FD
2007-10
PURCHASED
2009-04

\$6,937
\$
\$6,937
\$
\$13,052

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS S&P MIDCAP 400 GRWTH FD
2007-10
PURCHASED
2009-01
\$3,710
\$
\$3,710
\$
\$5,505

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS TR S&P 500 INDEX FD
2007-02
PURCHASED
2009-10
\$11,373
\$
\$11,373
\$
\$16,801

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

ISHRS TR DOWJONES US TELE INDX
2007-02
PURCHASED
2009-01
\$2,163
\$
\$2,163
\$
\$3,606

Federal Supporting Statements

2009

Name(s) as shown on return

FEIN

ISHRS TR DOWJONES US UTILS IDX
2007-02
PURCHASED
2009-04

\$266
\$
\$266
\$
\$378

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

SECTOR SPDR TR TECH SELECT SEC
2007-02
PURCHASED
2009-10
\$3,665
\$
\$3,665
\$
\$4,541

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

SELECT SCTR SPDR FD CONSUMER
2007-02
PURCHASED
2009-07
\$1,322
\$
\$1,322
\$
\$2,173

Name
Date Acquired
How Acquired
Date Sold
Purchaser
Gross Sales
Sales Expense
Total Net
Accumulated Depreciation
Basis

SELECT SCTR SPDR FD HEALTH CRE
2007-10
PURCHASED
2009-07
\$1,447
\$
\$1,447
\$
\$1,958

Federal Supporting Statements**2009**

Name(s) as shown on return

FEIN

SELECT SCTR SPDR TR CONSUMER
2007-07
PURCHASED
2009-10

\$2,854

\$

\$2,854

\$

\$3,044

Name	VANGUARD REIT ETF
Date Acquired	2008-01
How Acquired	PURCHASED
Date Sold	2009-01
Purchaser	
Gross Sales	\$5,061
Sales Expense	\$
Total Net	\$5,061
Accumulated Depreciation	\$
Basis	\$8,872

Name	ISHRS S&P MIDCAP 400 VAL FD
Date Acquired	2007-02
How Acquired	PURCHASED
Date Sold	2009-01
Purchaser	
Gross Sales	\$3,281
Sales Expense	\$
Total Net	\$3,281
Accumulated Depreciation	\$
Basis	\$5,313

Federal Supporting Statements

2009 PG 01

Your Social Security Number

43-1781735

Name(s) as shown on return

THE WILLCOXON FAMILY FOUNDATION

Statement #108

Form 990PF, Part I, Line 16(b) - Accounting Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
TAX PREPARATION	350	350	0	0
Totals	350	350	0	0

PG 01

Statement #109

Form 990PF, Part I, Line 16(c) - Other Professional Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
INVESTMENT FEES	1,527	1,527	0	0
Totals	1,527	1,527	0	0

PG 01

Statement #110

Form 990PF, Part I, Line 18 - Taxes Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
MO STATE FILING FEE	10	10	0	0
Totals	10	10	0	0