



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052
2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

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 Wilson Family Foundation		A Employer identification number 56-2042058	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 411 Tremont Circle		B Telephone number (see page 10 of the instructions) (828) 758-1375	
	City or town, state, and ZIP code Lenoir, NC 28645		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, col. (c), line 16) \$ 28,595,668		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 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)	300,000			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	46,740	46,740		
	4 Dividends and interest from securities.	565,321	565,321		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-928,083			
	b Gross sales price for all assets on line 6a <u>7,137,103</u>				
	7 Capital gain net income (from Part IV , line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-16,022	612,061		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	143	143		0
	b Accounting fees (attach schedule)	1,250	1,250		0
	c Other professional fees (attach schedule)	75,366	75,366		0
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	12,394	4,894		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	89,153	81,653		0
	25 Contributions, gifts, grants paid	1,385,500			1,385,500
	26 Total expenses and disbursements. Add lines 24 and 25	1,474,653	81,653		1,385,500
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,490,675			
	b Net investment income (if negative, enter -0-)		530,408		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	4,120,825	5,720,762	5,720,762
	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 15 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			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	25,622,956	22,520,941	22,874,742
	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 ▶ _____)	4,797	164	164	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	29,748,578	28,241,867	28,595,668	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	29,748,578	28,241,867	
	30	Total net assets or fund balances (see page 17 of the instructions)	29,748,578	28,241,867	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	29,748,578	28,241,867	

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 29,748,578
2	Enter amount from Part I, line 27a	2 -1,490,675
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 28,257,903
5	Decreases not included in line 2 (itemize) ▶ _____	5 16,036
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 28,241,867

Part IV

Capital Gains and Losses for Tax on Investment Income

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

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

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

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-928,083
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	1,851,881	30,938,382	0 059857
2007	1,751,700	35,208,778	0 049752
2006	1,391,700	33,499,173	0 041544
2005	1,259,100	32,707,859	0 038495
2004	1,785,100	32,746,841	0 054512

2	Total of line 1, column (d).	2	0 244160
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 048832
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	25,160,987
5	Multiply line 4 by line 3.	5	1,228,661
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	5,304
7	Add lines 5 and 6.	7	1,233,965
8	Enter qualifying distributions from Part XII, line 4.	8	1,385,500

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

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	5,304
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	5,304
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	5,304
6		Credits/Payments			
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a	9,780	
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	9,780
8		Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	4,476
11		Enter the amount of line 10 to be Credited to 2010 estimated tax ☒ 4,476	Refunded ☒	11	0

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
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)?	1b		No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.				
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☒ \$ 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.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☒ NC			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities (continued)

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		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶N/A				
14	The books are in care of ▶JANET H WILSON Telephone no ▶(828) 758-1375			
	Located at ▶411 TREMONT CIRCLE LENOIR NC ZIP+4 ▶28645			
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? ☐ 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 page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?. ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the 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 page 22 of the instructions)?

Organizations relying on a current notice regarding disaster assistance check here.

☒

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

☐ Yes ☒ No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

5b

6b

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
JANET WILSON	PRESIDENT	0	0	0
411 TREMONT CIRCLE	5 00			
LENOIR, NC 28645				
HENRY WILSON III	DIRECTOR	0	0	0
4830 SPORTSMAN DRIVE	5 00			
ANCHORAGE, AK 99502				
DAVID WILSON	DIRECTOR	0	0	0
1016 CLUB COMMONS CIRCLE	5 00			
ATLANTA, GA 30319				
AMY WILSON SCOTT	VICE PRESIDENT	0	0	0
5945 ARDEN DRIVE	5 00			
CLEMMONS, NC 27012				

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.

0

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.		0

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 23 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.	0

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	20,965,606
b	Average of monthly cash balances.	1b	4,578,543
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	25,544,149
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	25,544,149
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	383,162
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	25,160,987
6	Minimum investment return. Enter 5% of line 5.	6	1,258,049

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	1,258,049
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	5,304
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	5,304
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,252,745
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,252,745
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,252,745

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	1,385,500
b	Program-related investments—total from Part IX-B.	1b	0
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	1,385,500
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	5,304
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,380,196
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				1,252,745
2	Undistributed income, if any, as of the end of 2008				
a	Enter amount for 2008 only.			0	
b	Total for prior years 20____, 20____, 20____		0		
3	Excess distributions carryover, if any, to 2009				
a	From 2004.				196,972
b	From 2005.				
c	From 2006.				
d	From 2007.				13,032
e	From 2008.				324,600
f	Total of lines 3a through e.	534,604			
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,385,500				
a	Applied to 2008, but not more than line 2a			0	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d	Applied to 2009 distributable amount.				1,252,745
e	Remaining amount distributed out of corpus	132,755			
5	Excess distributions carryover applied to 2009 (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	667,359			
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 page 27 of the instructions . . .		0		
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
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).	0			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).	196,972			
9	Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	470,387			
10	Analysis of line 9				
a	Excess from 2005. . . .				
b	Excess from 2006. . . .				
c	Excess from 2007. . . .				13,032
d	Excess from 2008. . . .				324,600
e	Excess from 2009. . . .				132,755

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 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 organization had \$5,000 or more in assets at any time during the year—see page 27 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))

JANET WILSON

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	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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	1,385,500
b Approved for future payment				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge			
*****		2010-05-04	*****
Signature of officer or trustee		Date	Title

Paid Preparer's Use Only	Preparer's Signature	Date	Check if self-employed ☐		Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code		EIN		
	Sharrard McGee & Co PA PO Box 5869 High Point, NC 27262		Phone no (336) 884-0410		

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, or 990-PF.

OMB No 1545-0047

2009

Name of organization The Wilson Family Foundation	Employer identification number 56-2042058
---	---

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 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 an organization 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 990-EZ, that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 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 (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions 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 990-EZ, that received from any one contributor, during the year, 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. An Organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Part I Contributors (see Instructions)

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization The Wilson Family Foundation	Employer identification number 56-2042058
--	--

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

Name of organization The Wilson Family Foundation	Employer identification number 56-2042058
---	---

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 columns (a) through (e) and the following line entry)
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ► \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(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		

Additional Data

Software ID: 09000028
Software Version: 2009.03050
EIN: 56-2042058
Name: The Wilson Family Foundation

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
HSBC HOLDINGS PLC	P	2009-03-23	2009-04-21
UNITED STATE TREASURY BILL	P	2008-10-02	2009-04-02
UNITED STATE TREASURY BILL	P	2008-10-02	2009-09-24
AMERICAN INTL GROUP INC	P	2004-04-08	2009-08-14
KEELEY FDS INC	P	2006-06-12	2009-10-19
WELLS FARGO & CO NEW	P	1977-04-12	2009-01-21
WYETH COM	P	1995-03-09	2009-10-15
ZIMMER HOLDINGS INC	P	1989-09-14	2009-10-19
PFIZER INC	P		2009-11-13
SHADOWLINE INC	P		2009-09-02
AIG SEC V FAIR FUND	P		2009-06-17

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
1,143			1,143
2,286,239		2,286,239	0
2,267,021		2,267,021	0
8,480		507,182	-498,702
2,525,245		3,000,000	-474,755
4		61	-57
31,891			31,891
5,168		2,633	2,535
4			4
6,560		2,050	4,510
5,348			5,348

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			1,143
			0
			0
			-498,702
			-474,755
			-57
			31,891
			2,535
			4
			4,510
			5,348

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
ALDERSGATE HOMES INC4105 BRIARCLIFFE RD NE ATLANTA,GA 30345	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
ALEXANDER YOUTH NETWORK 6220 THERMAL RD CHARLOTTE,NC 28211	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
AMERICAN LEGION POST 29109 CLIFFWOOD DR HUDSON,NC 28638	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
BARIUM SPRINGS HOME FOR CHILDRENPO BOX 1 BARIUM SPRINGS,NC 28010	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
BOY SCOUTS OF AMERICAPO BOX 152079 IRVING,TX 75015	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	4,000
CALDWELL COUNCIL ON ADOLESCENT HEALTH918 WEST AVENUE NW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	8,000
CALDWELL COUNTY HABITAT FOR HUMANITYPO BOX 1341 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CALDWELL COUNTY HOSPICE902 KIRKWOOD ST NW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CALDWELL COUNTY YOLKFELLOW PO BOX 2422 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CALDWELL HALFWAY HOUSE INC CONNELLY SPRINGS ROAD LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
CALDWELL HERITAGE MUSEUM112 VAIDEN ST LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
CALDWELL MEMORIAL HOSPITAL FOUNDATIONPO BOX 1890 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	30,500
CARING HOUSE2625 PICKETT RD DURHAM,NC 27705	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
CATHOLIC SOCIAL SERVICES 3710 E 20TH AVENUE ANCHORAGE,AK 99508	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
CHALLENGE ALASKA3350 COMMERCIAL DRIVE STE 208 ANCHORAGE,AK 99501	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
Total  3a				1,385,500

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
CHILDREN'S HEALTHCARE1517 POND ROAD ALLENTOWN,PA 18104	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CHILDREN'S MUSEUM OF WINSTON-SALEM390 S LIBERTY ST WINSTON SALEM,NC 27101	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
CHILDRESS INSTITUTE FOR PEDIATRIC TRAUMAMEDICAL CENTER BLVD WINSTON SALEM,NC 27157	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	200,000
COMMUNITY CARE CENTER200 EAST STATE STREET ALLIANCE,OH 44601	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
DAVIDSON COLLEGEPO BOX 7169 DAVIDSON,NC 28035	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	300,000
DEERFIELD ACADEMY1 ALBANY ROAD DEERFIELD,MA 01342	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
DEKALB RAPE CRISIS CENTER INC 204 CHURCH ST DECATUR,GA 30030	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
DENISON UNIVERSITY100 WEST COLLEGE GRANVILLE,OH 43023	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
DIMOND ALUMNI205 E DIMOND BLVD 593 ANCHORAGE,AK 99515	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
DOCTORS WITHOUT BORDERSPO BOX 5030 HAGERSTOWN,MD 217415030	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
DUKE COMPREHENSIVE CANCER CENTERBOX 90581 DURHAM,NC 27708	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
DUKE UNIVERSITYDUKE UNIVERSITY DURHAM,NC 27708	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
DULATOWN PRESBYTERIAN CHURCH1537 MILLER HILL RD LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
EMORY UNIVERSITY LAW SCHOOL 1301 CLIFTON RD ATLANTA,GA 30322	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
FOOD BANK OF ALASKA2121 SPAR AVENUE ANCHORAGE,AK 99501	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
Total ▶ 3a				1,385,500

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
FRIENDS OF WILSON CREEKPO BOX 34 COLLETTSVILLE, NC 28611	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
GEORIGA LEGAL SERVICES PROGRAM104 MARIETTA ST NW STE 250 ATLANTA, GA 30303	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
GLOBAL HEALTH ACTION INC1902 CLAIMONT RD DECATUR, GA 30033	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
GOOD SAMARITAN HEALTH CENTER239 IVAN ALLEN BLVE NE ATLANTA, GA 30313	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
GRANDFATHER HOME FOR CHILDRENPO BOX 98 BANNER ELK, NC 28604	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
HABITAT FOR HUMANITY IN ATLANTA INC519 MEMORIAL DR SE ATLANTA, GA 30312	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
HEALTHY MOTHERS HEALTHY BABIES2300 HENDERSON MILL RD ATLANTA, GA 30345	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
HEIFER PROJECT INTERNATIONAL INCPO BOX 8058 LITTLE ROCK, AR 72203	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
HELPING HANDS541 CAMBRIDGE ST BOSTON, MA 02134	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	20,000
INSTITUTE FOR ONE WORLD HEALTH50 CALIFORNIA ST STE 500 SAN FRANCISCO, CA 94111	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
JOARA FOUNDATIONPO BOX 9000 ASHEVILLE, NC 28815	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
JUVENILE JUSTICE FUND INC395 PRYOR ST SW ATLANTA, GA 30312	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
KENT PLACE SCHOOL42 NORWOOD AVENUE SUMMIT, NJ 07902	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
KOINONIA INC1455 ITALY VALLEY ROAD MIDDLESEX, NY 14507	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
LA LECHE LEAGUE INTERNATIONAL1400 NORTH MEACHAM RD SCHAUMBURG ATLANTA, GA 30312	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
Total  3a				1,385,500

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
LEES MCRAE COLLEGE ADVANCEMENT OFFICE PO BOX 128 BANNER ELK, NC 28604	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
LENOIR HIGH SCHOOL FOUNDATION3355 OLD HIGHWAY 11 DEEP RUN, NC 28525	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
LENOIR LITTLE LEAGUE INC801 WEST AVENUE LENOIR, NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
LENOIR SOUP KITCHEN1113 COLLEGE AVE SW LENOIR, NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
LIFESPAN FARM3701 KIDD LANE CHARLOTTE, NC 28216	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
MADEIRA SCHOOL8328 GEORGETOWN PIKE MCLEAN, VA 22102	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	26,000
NATIONAL CENTER FOR MISSING AND EXPLOITED CHILDREN699 PRINCE ST ALEXANDRIA, VA 22314	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
NC WILDLIFE HABITAT FOUNDATIONPO BOX 29187 GREENSBORO, NC 27429	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	20,000
NORTH CAROLINA STROKE ASSOCIATIONPO BOX 571002 WINSTON SALEM, NC 27157	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
PATTERSON SCHOOL4646 PATTERSON SCHOOL DRIVE HWY 268 LENOIR, NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
PLANNED PARENTHOOD OF GEORGIA INC75 PIEDMONT AVE STE 800 ATLANTA, GA 30303	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
PRESBYTERIAN HOME FOR CHILDREN80 LAKE EDEN RD BLACK MOUNTAIN, NC 28711	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
PREVENT CHILD ABUSE GEORGIA INC1720 PEACHTREE ST NW STE 600 ATLANTA, GA 30309	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
PROVIDENCE ALASKA FOUNDATION3200 PROVIDENCE DRIVE ANCHORAGE, AK 99508	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	20,000
SAINT ANDREWS COLLEGE1700 DOGWOOD MILE LAURINBURG, NC 28352	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				1,385,500

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
SAINT JOSEPH'S MERCY FOUNDATION5673 PEACHTREE DUNWOODY ROAD NE ATLANTA,GA 30342	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
SALVATION ARMYPO BOX 269 ALEXANDRIA,VA 22313	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
SIT-IN MOVEMENT INC301 N ELM ST STE 303 GREENSBORO,NC 27401	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
SUSAN G KOMEN BREAST CANCER FOUNDATION5005 LBJ FWY STE 250 DALLAS,TX 75244	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
THE CARTER CENTER453 FREEDOM PKWY ATLANTA,GA 30307	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
THE EDUCATIONAL FOUNDATION OF CALDWELL COUNTY1914 HICKORY BLVD SW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
THE ELEPHANT SANCTURAYPO BOX 393 HOHENWALD,TN 38462	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
THE GORDIE FOUNDATION2715 SWISS AVE DALLAS,TX 75204	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
THE IXTATAN FOUNDATION2771 OLD LYNCHBURG ROAD NORTH GARDEN,VA 22959	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
THE KINCAID PROJECT GROUPO BOX 140695 ANCHORAGE,AK 99514	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	100,000
THE PINGRY SCHOOLPO BOX 366 MARTINSVILLE,NJ 08836	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
THE RAINBOW CONNECTION621 W UNIVERSITY ROCHESTER,MI 48307	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	20,000
THE SHELTER HOME OF CALDWELL COUNTYPO BOX 426 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	30,000
THE WIG BANK OF CALDWELL COUNTY1250 HICKORY BLVD SW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
UNION THEOLOGICAL SEMINARY 3041 BROADWAY AT 121 STREET NEW YORK,NY 10027	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
Total  3a				1,385,500

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
UNITED PRESBYTERIAN CHURCH 200 E TWELFTH STREET JEFFERSONVILLE,IN 47130	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
UNIVERSITY OF DENVER LAW SCHOOL 2255 E EVANS AVE DENVER,CO 80208	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
US FUND FOR UNICEF 1447 PEACHTREE ST NE ATLANTA,GA 30309	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
WELLESLEY COLLEGE 106 CENTRAL ST WELLESLEY,MA 02481	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
WESTMINSTER SCHOOLS 1424 WEST PACES FERRY ROAD NW ATLANTA,GA 30327	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
WILLIAMS COLLEGE 75 PARK ST WILLIAMSTOWN,MA 01267	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
WOODBERRY FOREST SCHOOL 10 WOODBERRY STATION WOODBERRY FOREST,VA 22989	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
Total			3a	1,385,500

TY 2009 Accounting Fees Schedule

Name: The Wilson Family Foundation

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	1,250	1,250		0

**TY 2009 Investments Corporate
Stock Schedule**

Name: The Wilson Family Foundation

EIN: 56-2042058

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK INVESTMENTS	22,520,941	22,874,742

TY 2009 Legal Fees Schedule

Name: The Wilson Family Foundation

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	143	143		0

TY 2009 Other Assets Schedule

Name: The Wilson Family Foundation

EIN: 56-2042058

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
C/Y DIVIDENDS RECEIVED IN FOLLOWING YEAR	4,797	164	164

TY 2009 Other Decreases Schedule

Name: The Wilson Family Foundation

EIN: 56-2042058

Description	Amount
ADJUSTMENT FOR MERGER OF WYETH & PFIZER	16,036

TY 2009 Other Professional Fees Schedule

Name: The Wilson Family Foundation

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MANAGEMENT FEES	75,366	75,366		0

TY 2009 Taxes Schedule

Name: The Wilson Family Foundation

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2009 ESTIMATED TAXES	7,500	0		0
FOREIGN TAX	4,894	4,894		0