



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-EZ**Department of the Treasury
Internal Revenue Service**Short Form**
Return of Organization Exempt From Income TaxUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)

- Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form.
- The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-1150

2009**Open to Public Inspection****A For the 2009 calendar year, or tax year beginning , and ending****B** Check if applicable

- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Termination
- ☐ Amended return
- ☐ Application pending

Please use IRS label or print or type See Specific Instructions.

C Name of organization**Woodrow and Hazel Wilson Foundation**

Number and street (or P O box, if mail is not delivered to street address)

12587 Anita Place

Room/suite

City or town, state or country, and ZIP + 4

Oregon City**OR 97045-7575****D** Employer identification number**93-1216640****E** Telephone number**503-657-2559****F** Group Exemption Number**Number**

- Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

G Accounting method ☒ Cash ☐ Accrual

Other (specify) ►

I Website: ► **N/A****J** Tax-exempt status (check only one) — ☒ 501(c) (**2**) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**H** Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)**K** Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return.**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if \$500,000 or more, file Form 990 instead of Form 990-EZ. ► \$ **192,876****Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I.)

		Revenue		Expenses		Net Assets	
1	Contributions, gifts, grants, and similar amounts received	1		10	Grants and similar amounts paid (attach schedule)	18	Excess or (deficit) for the year (Subtract line 17 from line 9)
2	Program service revenue including government fees and contracts	2		11	Benefits paid to or for members	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)
3	Membership dues and assessments	3		12	Salaries, other compensation, and employee benefits	20	Other changes in net assets or fund balances (attach explanation)
4	Investment income	4	17,876	13	Professional fees and other payments to independent contractors	21	Net assets or fund balances at end of year. Combine lines 18 through 20
5a	Gross amount from sale of assets other than inventory	5a	175,000	14	Occupancy, rent, utilities, and maintenance		
b	Less cost or other basis and sales expenses	5b	175,875	15	Printing, publications, postage, and shipping		
c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		See Stmt 1	16	Other expenses (describe ► See Statement 4)	16	7,293
6	Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ☐	5c	-875	17	Total expenses. Add lines 10 through 16	17	41,693
a	Gross revenue (not including \$ _____ of contributions reported on line 1)	6a		18	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	18	17,001
b	Less direct expenses other than fundraising expenses	6b		9		9	17,001
c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c		10		10	20,000
7a	Gross sales of inventory, less returns and allowances	7a		11		11	
b	Less cost of goods sold	7b		12		12	5,175
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c		13		13	9,225
8	Other revenue (describe ► _____)	8		14		14	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9		15		15	
				16		16	7,293
				17		17	41,693
				18		18	-24,692
				19		19	965,033
				20		20	-1,400
				21		21	938,941

Part II Balance Sheets. If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

		(A) Beginning of year		(B) End of year	
22	Cash, savings, and investments	965,033	22	938,941	
23	Land and buildings		23		
24	Other assets (describe ► _____)		24		
25	Total assets	965,033	25	938,941	
26	Total liabilities (describe ► _____)	0	26	0	
27	Net assets or fund balances (line 27 of column (B) must agree with line 21)	965,033	27	938,941	

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Form **990-EZ** (2009)

SCANNED APR 16 2010

RECEIVED

MAR 25 2010

OGDEN, UT

IRS-OSC

Part V Other Information (Note the statement requirements in the instructions for Part V.)

	Yes	No
33 Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity		X
34 Were any changes made to the organizing or governing documents? If "Yes," attached a conformed copy of the changes		X
35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T		
a Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N		X
37a Enter amount of political expenditures, direct or indirect, as described in the instr	37a	
b Did the organization file Form 1120-POL for this year?	37b	X
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the period covered by this return?	38a	X
b If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	
39 Section 501(c)(7) organizations Enter.	39a	
a Initiation fees and capital contributions included on line 9	39b	
b Gross receipts, included on line 9, for public use of club facilities		
40a Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under: section 4911 ▶ _____, section 4912 ▶ _____, section 4955 ▶ _____		
b Section 501(c)(3) and 501(c)(4) organizations Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b	
c Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958		
d Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e	X
41 List the states with which a copy of this return is filed ▶ OR		
42a The organization's books are in care of ▶ Richard L. Hart Telephone no ▶ 503-657-2559		
12587 Anita Place		
Located at ▶ Oregon City, OR ZIP + 4 ▶ 97045		
b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	X
If "Yes," enter the name of the foreign country ▶ _____		
See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
c At any time during the calendar year, did the organization maintain an office outside of the U S ?	42c	X
If "Yes," enter the name of the foreign country ▶ _____		
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here ▶ 43		
and enter the amount of tax-exempt interest received or accrued during the tax year		
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44	X
45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45	X

Part VI Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only. All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

- 46** Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I
- 47** Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II
- 48** Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E
- 49a** Did the organization make any transfers to an exempt non-charitable related organization?
- b** If "Yes," was the related organization a section 527 organization?

	Yes	No
46		
47		
48		
49a		
49b		

- 50** Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances

f Total number of other employees paid over \$100,000 ▶

- 51** Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000 ▶

Sign Here	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 officer) is based on all information of which preparer has any knowledge.			
	13-18-10 Date Signature of officer Richard L. Hart Type or print name and title Chair			
Paid Preparer's Use Only	03/18/10 Date Preparer's signature Beemer Smith Munro & Co., LLP Firm's name (or yours if self-employed), address, and ZIP + 4 10135 SE Sunnyside Rd Ste 140 Clackamas, OR 97015-5732	P00005442 Preparer's Identifying Number (See instr)		
	93-0668420 EIN			
	503-656-6900 Phone no			

May the IRS discuss this return with the preparer shown above? See instructions

▶ ☒ **Yes** ☐ **No**

Federal Statements

3/18/2010 8:47 AM

Statement 1 - Form 990-EZ, Part I, Line 5c - Sale of Assets Other than Inventory - Securities

Description		How Received	Whom Sold	Date Acquired	Date Sold	Sale Price	Cost & Expense	Depreciation	Gain / Loss
50000	BNB BK National NJ CD Donation			2/12/09	8/24/09	\$ 50,000	\$ 50,000	\$	
50000	General Electric Donation			2/12/09	9/01/09	50,000	50,875		-875
25000	Minnwest Bk Donation			2/12/09	11/19/09	25,000	25,000		
50000	Rockbridge Bk Donation			2/12/09	8/24/09	50,000	50,000		
Total						\$ 175,000	\$ 175,875	0	\$ -875

Statement 2 - Form 990-EZ, Part I, Line 5c - Sale of Assets Other than Inventory - Other

Description		How Received	Whom Sold	Date Acquired	Date Sold	Sale Price	Cost & Expense	Depreciation	Gain / Loss
Ameritrade- Cap Gain Dist.						\$	\$		
SEI Corp - Cap Gain Dist.						\$	\$		
Total						\$ 0	\$ 0	0	\$ 0

Statement 3 - Form 990-EZ, Part I, Line 10 - Grants and Similar Amounts Paid to Organizations

Name and Address		Class of Activity		Date of Gift	Description of Property	Cash Contribution	Noncash Contribution	Book Value	Book Value Explanation	FMV Explanation
Lents Masonic Lodge				4/01/09		20,000				

437000 Woodrow and Hazel Wilson Foundation
93-1216640
FYE: 12/31/2009

Federal Statements

3/18/2010 8:47 AM

Statement 3 - Form 990-EZ, Part I, Line 10 - Grants and Similar Amounts Paid to Organizations (continued)

Name and Address	Date of Gift	Description of Property	Class of Activity		Noncash Contribution	Book Value	Book Value Explanation	FMV Explanation
			Cash Contribution					
5811 SE 92nd Avenue Portland, OR 97266								
Total			20,000					

Federal Statements

FYE: 12/31/2009

Statement 4 - Form 990-EZ, Part I, Line 16 - Other Expenses

<u>Description</u>	<u>Amount</u>
Expenses	\$
Office	178
Investment Management Fee	7,115
Total	\$ 7,293

Statement 5 - Form 990-EZ, Part I, Line 20 - Other Changes in Net Assets or Fund Balances

<u>Description</u>	<u>Amount</u>
Prior year member board service fees outstanding	\$ -1,400
Total	\$ -1,400

Statement 6 - Form 990-EZ, Part III - Organization's Primary Exempt Purpose

Description

Income from the Foundtion provides support to the Lent's Masonic Lodge, a 501(c)(10) organization pursuant to the exempt purpose of the foundation.

437000 Woodrow and Hazel Wilson Foundation
, 93-1216640

3/18/2010 8:47 AM

Federal Statements

FYE: 12/31/2009

<u>Description</u>	<u>Cash</u> <u>Amount</u>
	\$ <u>23,766</u>
Total	\$ <u><u>23,766</u></u>

Forms 990 / 990-EZ Return Summary

For calendar year 2009, or tax year beginning

, and ending

93-1216640**Woodrow and Hazel Wilson Foundation****Net Asset / Fund Balance at Beginning of Year****965,033****Revenue**

Contributions

Program service revenue

Investment income

Capital gain / loss

Special events:

Gross revenue

Direct expenses

Net income

Other income

Total revenue**17,876****-875****17,001****Expenses**

Program services

Management and general

Fundraising

Total expenses**Excess / (deficit)****41,693****-24,692**

Other changes

-1,400**Net Asset / Fund Balance at End of Year****938,941****Reconciliation of Revenue**

Total revenue per financial statements

Less:

Unrealized gains

Donated services

Recoveries

Other

Plus

Investment expenses

Other

Total revenue per return**Reconciliation of Expenses**

Total expenses per financial statements

Less:

Donated services

Prior year adjustments

Losses

Other

Plus:

Investment expenses

Other

Total expenses per return**Balance Sheet****Beginning****Ending****Differences**

Assets

965,033**938,941**

Liabilities

Net assets

965,033**938,941****-26,092****Miscellaneous Information**

Amended return

Return / extended due date

Failure to file penalty

05/17/10