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

2010

For calendar year 2010, or tax year beginning , 2010, 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

Name of foundation

THE HUEY & ANGELINA WILSON FOUNDATION

A Employer identification number: 58-1714586

Number and street (or P O box number if mail is not delivered to street address) | Room/suite

3636 SOUTH SHERWOOD FOREST BLVD., SUITE 650

B Telephone number (see page 10 of the instructions): (225) 292-1344

City or town, state, and ZIP code

BATON ROUGE, LA 70816

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) ▶ $ 50,882,698.

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)	0.			
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments	157,316.	157,316.		ATCH 1
	4 Dividends and interest from securities	391,375.	391,375.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,817,007.			
	b Gross sales price for all assets on line 6a 17,072,137.				
	7 Capital gain net income (from Part IV, line 2)		1,817,007.		
	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)	-833,600.	-833,600.		ATCH 3
	12 **Total.** Add lines 1 through 11	1,532,098.	1,532,098.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) ATCH 4	16,930.	8,465.	0.	8,465.
	c Other professional fees (attach schedule) *	197,679.	197,679.		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) **	37,985.	10,292.		0.
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 7	27,144.	3,502.		23,642.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	279,738.	219,938.	0.	32,107.
	25 Contributions, gifts, grants paid	2,407,831.			2,407,831.
	26 **Total expenses and disbursements** Add lines 24 and 25	2,687,569.	219,938.	0.	2,439,938.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	-1,155,471.			
	b **Net investment income** (if negative, enter -0-)		1,312,160.		
	c **Adjusted net income** (if negative, enter -0-)				

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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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets			
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments	966,445.	2,001,372.	2,001,372.
3 Accounts receivable ▶ 193,529.			
Less allowance for doubtful accounts ▶	968,802.	193,529.	193,529.
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			
10 a Investments - U S and state government obligations (attach schedule)			
b Investments - corporate stock (attach schedule) ATCH 8	15,229,683.	14,281,018.	16,865,742.
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) ATCH 9	28,635,812.	31,822,055.	31,822,055.
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)	45,800,742.	48,297,974.	50,882,698.
Liabilities			
17 Accounts payable and accrued expenses	0.	73,012.	
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.	73,012.	
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	200,000.	200,000.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds	45,600,742.	48,024,962.	
30 **Total net assets or fund balances** (see page 17 of the instructions)	45,800,742.	48,224,962.	
31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	45,800,742.	48,297,974.	

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	45,800,742.
2 Enter amount from Part I, line 27a	2	-1,155,471.
3 Other increases not included in line 2 (itemize) ▶ ATTACHMENT 10	3	3,579,691.
4 Add lines 1, 2, and 3	4	48,224,962.
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	48,224,962.

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 PART IV SCHEDULE			
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	1,817,007.
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))
2009	2,582,678.	42,583,881.	0.060649
2008	2,636,000.	50,403,530.	0.052298
2007	2,373,129.	54,938,275.	0.043196
2006	1,600,360.	48,687,548.	0.032870
2005	1,811,007.	41,771,657.	0.043355

2 **Total** of line 1, column (d)	2	0.232368
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	0.046474
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	47,335,288.
5 Multiply line 4 by line 3	5	2,199,860.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	13,122.
7 Add lines 5 and 6	7	2,212,982.
8 Enter qualifying distributions from Part XII, line 4	8	2,439,938.

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 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 ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ____________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	13,122.
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	
3	Add lines 1 and 2	3	13,122.
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	13,122.
6	Credits/Payments		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a: 147,572.		
b	Exempt foreign organizations-tax withheld at source — 6b: 0.		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 0.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	147,572.
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	134,450.
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 50,000. **Refunded** ▶	11	84,450.

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?	1a		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)?	1b		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?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ 0. (2) On foundation managers ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
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		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ LA,			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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 ▶ WWW.HAWILSONFOUNDATION.ORG

14 The books are in care of ▶ HUEY WILSON INTERESTS, INC. Telephone no ▶ 225-292-1344
Located at ▶ 3636 S. SHERWOOD FOREST, STE 650 BATON ROUGE, LA ZIP + 4 ▶ 70816

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

			Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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 22 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2010?	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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☒ 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 22 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 ▶ ________, ________, ________, ________			
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 2010 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 2010)*	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 2010?	4b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

		Yes	No
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)?	**5b**		
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?	**6b**		X
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?	**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
ATTACHMENT 11		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

Total number of other employees paid over $50,000 ▶ NONE

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
ATTACHMENT 12		174,965.
Total number of others receiving over $50,000 for professional services ▶		NONE

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 N/A	
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 N/A	
2	
All other program-related investments See page 24 of the instructions 3 N/A	
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	46,572,445.
b	Average of monthly cash balances	1b	1,359,521.
c	Fair market value of all other assets (see page 25 of the instructions)	1c	124,164.
d	**Total** (add lines 1a, b, and c)	1d	48,056,130.
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	48,056,130.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	720,842.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	47,335,288.
6	**Minimum investment return.** Enter 5% of line 5	6	2,366,764.

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	2,366,764.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	13,122.		
b	Income tax for 2010 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	13,122.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	2,353,642.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	2,353,642.
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	2,353,642.

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	2,439,938.
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	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	2,439,938.
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	13,122.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,426,816.

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 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7				2,353,642.
2	Undistributed income, if any, as of the end of 2010				
a	Enter amount for 2009 only			624,324.	
b	Total for prior years 20 08 ,20 07 ,20 06				
3	Excess distributions carryover, if any, to 2010				
a	From 2005				
b	From 2006				
c	From 2007				
d	From 2008				
e	From 2009 0.				
f	Total of lines 3a through e	0.			
4	Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 2,439,938.				
a	Applied to 2009, but not more than line 2a			624,324.	
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 2010 distributable amount				1,815,614.
e	Remaining amount distributed out of corpus	0.			
5	Excess distributions carryover applied to 2010 (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	0.			
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 2009 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f	Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				538,028.
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 2005 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	**Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	0.			
10	Analysis of line 9				
a	Excess from 2006				
b	Excess from 2007				
c	Excess from 2008				
d	Excess from 2009				
e	Excess from 2010 0.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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))

ANGELINA 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.

NONE

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:

ATTACHMENT 13

b The form in which applications should be submitted and information and materials they should include

SEE ATTACHMENT 13

c Any submission deadlines:

SEE ATTACHMENT 13

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

SEE ATTACHMENT 13

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				
ATTACHMENT 14				
Total ▶ 3a				2,407,831.
b Approved for future payment				
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(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			14	157,316.	
4 Dividends and interest from securities			14	391,375.	
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	1,817,007.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b PARTNERSHIP INCOME	541900	-14,309.	14	-34,126.	
c OTHER INCOME			01	-785,165.	
d					
e					
12 Subtotal Add columns (b), (d), and (e)		-14,309.		1,546,407.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . . . . 13 1,532,098.

(See worksheet in line 13 instructions on page 29 to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions)
	NOT APPLICABLE

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

			Yes	No
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?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	N/A		N/A

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

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 taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Signature of officer or trustee: [signature] Date: 11/14/2011 Title: PRESIDENT

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
STEWART GOODSON	Stewart Goodson, CPA	14 Nov 2011		P00084462

Firm's name ▶ ERNST & YOUNG U.S. LLP Firm's EIN ▶ 34-6565596

Firm's address ▶ 701 POYDRAS ST STE 3900 NEW ORLEANS, LA 70139 Phone no 504-581-4200

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INTEREST INCOME FROM INVESTMENTS	169,282.	169,282.
OID INCOME FROM INVESTMENTS	10,561.	10,561.
LESS: ACCRUED INTEREST PAID	-22,527.	-22,527.
TOTAL	157,316.	157,316.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DIVIDEND INCOME FROM INVESTMENTS	250,897.	250,897.
DE SHAW COMPOSITE INTL FUND	140,478.	140,478.
TOTAL	391,375.	391,375.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
PARTNERSHIP LOSS - PIEDMONT PARTNERS LP	-10,395.	-10,395.
PARTNERSHIP LOSS - CALIM BRIDGE PTNRS	-14,890.	-14,890.
PARTNERSHIP LOSS - KAYNE ANDERSON	-23,150.	-23,150.
LINCOLN TRUST IRA DISTRIBUTION	183,637.	183,637.
WHITEBOX CREDIT ARBITRAGE REFUND	-968,802.	-968,802.
TOTALS	-833,600.	-833,600.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES	16,930.	8,465.		8,465.
TOTALS	16,930.	8,465.	0.	8,465.

THE HUEY & ANGELINA WILSON FOUNDATION 58-1714586

ATTACHMENT 5

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INVESTMENT FEES-UBS	174,965.	174,965.
CHI RHO PROFESSIONAL FEES	22,714.	22,714.
TOTALS	197,679.	197,679.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
FOREIGN TAX PAID	10,292.	10,292.	0.
EXCISE TAXES PAID - PY	841.		
ESTIMATED TAX PAYMENTS	80,000.		
EXCISE TAX REFUND	-53,148.		
TOTALS	37,985.	10,292.	0.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
INSURANCE	3,195.	1,597.	1,598.
BANK CHARGES	218.	218.	0.
DUES & SUBSCRIPTIONS	6,749.	1,687.	5,062.
WEBSITE EXPENSES	1,875.	0.	1,875.
SOFTWARE AND TRAINING	15,107.	0.	15,107.
TOTALS	27,144.	3,502.	23,642.

ATTACHMENT 8

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
UBS INVESTMENTS (VAR. INVESTMENT PORTFOLIOS)	15,229,683.	14,281,018.	16,865,742.
TOTALS	15,229,683.	14,281,018.	16,865,742.

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
DE SHAW COMPOSITE FUND	3,083,843.	284,545.	284,545.
PIEDMONT PARTNERS, LTD.	19,165,134.	22,939,834.	22,939,834.
WHITEBOX FUNDS	4,389,454.	6,485,763.	6,485,763.
CALIM BRIDGE PARTNERS II	879,295.	840,269.	840,269.
KAYNE ANDERSON PRIV INV	571,772.	419,307.	419,307.
MS EMERGING PRIVATE MKTS FUND	546,314.	852,337.	852,337.
TOTALS	28,635,812.	31,822,055.	31,822,055.

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION		AMOUNT
NONDIVIDEND DISTRIBUTIONS		2,885.
UNREALIZED GAINS/LOSSES		2,820,338.
BOOK/TAX TIMING DIFFERENCES		756,468.
	TOTAL	3,579,691.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 11

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
ANGELINA M. WILSON 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
DONNA M. SAURAGE 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
DIANNE WILSON 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
JOHN H. WILSON 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
DENVER C. WILSON 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
BEN R. MILLER, JR. 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 11 (CONT'D)

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
J.H. CAMPBELL, JR. 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
CORNELIUS A. LEWIS 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
DANIEL J. BEVAN 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
RENEE D. JOYAL 3636 SOUTH SHERWOOD FOREST BLVD., S BATON ROUGE, LA 70816	TRUSTEE 1.00	0.	0.	0.
	GRAND TOTALS	0.	0.	0.

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALS

ATTACHMENT 12

NAME AND ADDRESS	TYPE OF SERVICE	COMPENSATION
UBS 10375 PARK MEADOW DRIVE, STE 400 LITTLETON, CO 80124-6736	INVESTMENT MGT.	174,965.
	TOTAL COMPENSATION	174,965.

HUEY AND ANGELINA WILSON FOUNDATION

Information for Grant Applications for 2010

Purpose

Huey and Angelina Wilson were both born and raised in Depression era Louisiana in large families with modest means. In February 2008, Mr. Wilson passed away on his 80th birthday. Early on working together as husband and wife, the Wilsons founded a catalog showroom retail business that grew to become the largest company headquartered in Baton Rouge employing 10,000 people and spanning 13 states by the time of its sale in 1985. That same year the Wilsons co-founded an oilfield service business in Houma, Louisiana that today employs approximately 1,800 people. The company is the US largest fabricator of offshore production platforms for installation worldwide.

The Wilson's have been blessed with substantial financial success and have dedicated a meaningful part of their wealth to the Huey and Angelina Wilson Foundation. The Foundation meets semi-annually to review grants and awards competitive grants to non-profit organizations.

An organization must meet two requirements to apply for a grant.

- The organization or its fiscal agent must be tax exempt under Section 501(c)3 of the Internal Revenue Code. (A fiscal agent must submit a letter of agreement)
- The program or project must serve the greater Baton Rouge area.

The Foundation's present areas of focus are:

- **Human Services**: The Foundation believes it is necessary for the community to identify and meet human needs. We support many different kinds of programs that work to make people's lives better.
- **Healthcare**. Quality healthcare is important to the whole community's well being. We support healthcare education and programs that give people the medical care they need.
- **Education**: The Foundation focuses its support on learning and development from early childhood through high school. We encourage partnerships and activities that bring the community together to build on current strengths and work toward systemic change in areas that can improve educational systems and opportunities for children in our community.
- **Prison Release**: Reducing the recidivism rate affects the entire community. The Foundation supports programs and services that prepare the incarcerated population for release into society with interaction in a community church and a relationship with God.

Of particular interest to the Foundation are the handicapped, both physical and mental, those afflicted with disease, disadvantaged youth, the hungry and the homeless While care for the less fortunate is important to the Foundation, the Trustees will look particularly favorably on grantees addressing the root cause of the misfortune and where practical or possible assist their targeted group to become self-sufficient productive contributors to the community.

The Huey and Angelina Wilson Foundation believes that communities are strengthened when people begin to see themselves as resources, and find successful ways of marshalling their talents and the talents of local people and organizations to solve problems. The Huey and Angelina Wilson Foundation supports non-profit organizations within the Foundation's present areas of focus that can demonstrate that they have planned their projects with respect to the community's greatest opportunities. Grant applicants should keep in mind that priority is given to projects that build on strengths and assets of individuals, organizations and institutions and that address the underlying causes of the problems presented rather than treating symptoms. The Foundation is interested in supporting organizations that reflect the diversity of the community they serve in their boards, staff and program focus.

The Foundation will consider grant applications only from non-profit organizations located in the greater Baton Rouge area. The Foundation believes its highest and best use of grant dollars are for capacity building within non-profits. If we can help an organization improve from a "C" performer to a "B+" performer all of its constituencies are helped, clients are better served, staff and volunteers are more efficiently utilized, and grantors and contractors monies are more efficiently expended. The Foundation also provides the following traditional types of grants:

- Program Grants – Program grants support the direct and operational costs needed to support new, creative or beneficial programs. Allowable costs may include staff salaries and benefits, supplies, equipment, travel, office leases, utilities and training.
- Capital Grants – Capital grants are made for new construction, major renovation and the purchase of permanent assets. These grants may cover costs such as phone systems, computers, and technology upgrading as well as vans or buses.
- Bridge Grants – Bridge grants help mature organizations through times of economic hardship. The organization must show that it can sustain itself after the funding ends.

The Foundation does not currently fund endowments or provide seed grants to new organizations. The Foundation's Trustees meet semi-annually to review grant requests from the greater Baton Rouge area addressing the above areas. Grant approvals are competitive with typical approved grants ranging in size from $10,000 to $50,000. The median size is expected to be about $30,000. The Foundation will consider funding two or three grants as large as $100,000 in 2010.

In lieu of a concept paper all grants in excess of $30,000 must be reviewed in reasonable detail with any member of the staff by telephone or in person and receive a verbal approval of the grant concept and size <u>prior to submission of the proposal</u>.

GRANT PROPOSAL SUBMISSION

Grant proposals are due February 26, 2010 and August 27, 2010. Proposal applications will be accepted only through on-line submission at www.hawilsonfoundation.org. The application will be active for the entire months of February and August. If there are any questions or difficulties accessing the application please contact Jan Ross at 225-292-1344.

GRANT PROPOSAL REVIEW PROCESS

After the proposal is submitted, the staff will read each proposal, may call to ask questions, and will have a preliminary meeting to determine site visit candidates. The staff will make the grant recommendations to the full Board of Trustees from which the Trustees will make final decisions

GRANTMAKING SCHEDULE

Grant requests should be received by 5:00 pm on the deadline date The deadline and notification dates are:

Dcadlinc Datcs:	Notification Datcs:
February 26, 2010	May 3, 2010
August 27, 2010	November 1, 2010

AWARD ANNOUNCEMENTS

If your proposal is not funded, you will receive a letter informing you of the Board's decision. Those who receive funding will get an award check with a letter that states the grant's conditions.

REPORTING REQUIREMENT

If a grant is awarded, the Foundation requires that the funded organization submit both fiscal accounting and narrative reports on the use of the funds and the impact the grant has had on the community it serves. Reporting guidelines are available on the website. These reports are due as follows:

Award Date	Interim Report	Final Report
May 3, 2010	October 1, 2010	March 31, 2010
November 1, 2010	March 31, 2011	September 30, 2011

To be considered for future funding, reports must be provided on a timely basis.

Questions regarding the Foundation should be directed to Dan Bevan, Jan Ross, or Dianne Stephens at the Huey and Angelina Wilson Foundation at:

Phone: 225-292-1344 Fax: 225-292-1589

Email:

Jan Ross	janross@hwilson org
Dianne Stephens	distephens@hwilson org
Dan Bevan	danbevan@hwilson org

Approved: October 27, 2009

ATTACHMENT 13

Organizations applying for grants should draft a proposal using the following checklist.

PROPOSAL CHECKLIST

It is recommended that the grant be typed using Microsoft Word or other word processing program and copy and paste responses into the online application. There should be no bullets, tables or extra formatting to responses.

A. **Proposal Summary**: Every application must include a one page summary which provides the following information:

- Organizational name
- Chief Executive Officer
- Brief summary of the project (50 words or less)
- Project Director/Primary Contact – if different from the CEO
- Address
- Phone number
- Compelling reason for the project (50 words or less)
- Amount of request
- Beginning and Ending dates of your project
- Type of request
- Have you been awarded LANO's Standards for Excellence Certification?
- Are you a United Way member agency?

B. **Narrative Section**: The application should include a narrative in no more than 5 pages of concise information including the following. (To follow the on-line application question 1 including the mission statement should be one page; questions 2-8 should not exceed four pages. Any proposal exceeding the page limit will not be considered.)

1. Mission Statement and a concise history of the organization with an overview of current programs and activities.

2. Describe the challenge to be addressed by the project. Describe your population and how serious the problem or need is for those that you want to serve.

3. Describe the program/project for which you seek funding, why you decided to pursue this project and whether it is a new or ongoing project.

4. What are the goals, objectives and activities/strategies involved in this request? Describe your specific activities/strategies, using a timeline over the course of this request.

5 Is this type of program or project currently offered in the community, if so please list the organizations providing this service and how your program/project will provide additional value?

6. Who are the collaborators for this project/program, if any?

7. Explain how your program/project will be evaluated
   - How do you define success for this effort?
   - What short-term and long-term results will you track?
   - What will you use to measure your program or project's effectiveness? (For example, surveys, pre and post-tests, interviews, etc.) Describe those instruments
   - How will you keep this data?

8. Plans for continuing the program/project once this funding ends.

C. **Attachments**: The following attachments are required Please do not send articles of incorporation, state non-profit verification, employer identification certificates, photos, slides or videotapes. Attachments should include the following information:

1. Names and qualifications of persons responsible for carrying out the program. Short biographies are acceptable. No resumes, please.

2. Detailed project budget and budget narrative, including income sources and expenditures, as well as a list of other requests for funding, including those pending and/or approved.

3. A list of the organization's board members including the board members' principal occupations, a description of the term of office and the rotation schedule for the board

4. Financial statements, including the organization's operating budget, balance sheet and statements of support, revenue and expenses, **year to date** through the most recent date **(within the previous 2 months of submission)** and most recent full year if not covered by the Form 990.

5. Copy of the Internal Revenue Service determination letter stating that the organization or its fiscal agent is tax-exempt under section 501(c)3 of the IRC. Note: The fiscal agent must provide a separate letter stating its willingness to serve.

6. Statement from the organization's board of directors authorizing the request and agreeing to implement the project if funded.

7. The most recently submitted Form 990.

8. If collaborators are involved, letters of support or a signed collaborative agreement.

9. Optional: One copy of supporting material, such as report, brochure or news article

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ADVANCE INNOVATIVE EDUCATION 8768 QUARTERS LAKE ROAD BUILDING 11, SUITE 5 BATON ROUGE, LA 70809	NONE PUBLIC	REDESIGNING LESSONS, RE-ENVISIONING PRINCIPALS	50,000.
ALZHEIMER'S SERVICES OF THE CAPITAL AREA 3772 NORTH BOULEVARD, STE B BATON ROUGE, LA 70806	NONE PUBLIC	MEMORIES LUNCHEON CHALLENGE GIFT	30,000
AMERICAN RED CROSS-LA CAPITAL AREA CHAPTER 4655 SHERWOOD COMMON BLVD BATON ROUGE, LA 70816	NONE PUBLIC	DISASTER READINESS CAPACITY BUILDING TECHNOLOGY INFRASTRUCTURE PROJECT	57,000
AMYOTROPHIC LATERAL SCLEROSIS ASSOCIATION 640 MAIN STREET BATON ROUGE, LA 70801	NONE PUBLIC	PATIENT SERVICES GEN /OPERATING SUPPORT TECHNOLOGY SUPPORT	25,000.
ASSOCIATION OF RETARDED CITIZENS 8326 KELWOOD BATON ROUGE, LA 70806	NONE PUBLIC	TRANSDISCIPLINARY TEAMING GOES HIGH-TECH UPGRADING TIME AND ATTENDANCE SYSTEM	85,778
AWANA CLUBS INTERNATIONAL 1 EAST BODE ROAD STREAMWOOD, IL 60107-6658	NONE PUBLIC	AWANA LIFELINE LOUISIANA	25,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BATON ROUGE COMMUNITY CLINIC P O. BOX 65373 BATON ROUGE, LA 70896	NONE PUBLIC	CREATING SUSTAINABLE FUNDING & PROVIDING A MEDICAL HOME	20,000
GREATER BATON ROUGE FOOD BANK P O BOX 2996 BATON ROUGE, LA 70821-2996	NONE PUBLIC	FROM HUNGER TO HOPE BUCKS FOR TRUCKS	125,000
GREATER BATON ROUGE LITERACY COALITION 564 LAUREL STREET BATON ROUGE, LA 70801	NONE PUBLIC	MEMBERSHIP AND HUMAN CAPITAL CAMPAIGN	30,000
BR SPEECH AND HEARING FOUNDATION 535 ROOSEVELT STREET BATON ROUGE, LA 70802	NONE PUBLIC	50TH ANNIVERSARY BRANDING AND DEVELOPMENT	26,698.
CANCER SERVICES OF GREATER BATON ROUGE 550 LOBDELL AVENUE BATON ROUGE, LA 70806	NONE PUBLIC	FINANCIAL ASSISTANCE SERVICES PROGRAM 2010 CHALLENGE GRANT ANNUAL GIVING PROGRAM	50,000
MCMAINS CHILDREN'S DEVELOPMENT CENTER 1805 COLLEGE DRIVE BATON ROUGE, LA 70808	NONE PUBLIC	INCREASING INDEPENDENCE AND AWARENESS	35,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CHURCH UNITED FOR COMMUNITY DEVELOPMENT 19202 HIGHLAND ROAD GONZALES, LA 70707	NONE PUBLIC	HOUSING/JOB TRAINING IN DONALDSONVILLE PRISONER COALITION RENEWAL COMMUNITIES COMMITTED TO REENTRY(CCR) COALITION	120,155.
CONNECTIONS FOR LIFE 3027 NICHOLSON DRIVE BATON ROUGE, LA 70802	NONE PUBLIC	EMPLOYMENT OF A SOCIAL ENTERPRISE MANAGER	27,500
FAMILY ROAD OF GREATER BATON ROUGE 323 EAST AIRPORT DRIVE BATON ROUGE, LA 70806	NONE PUBLIC	FAMILY ROAD DEDICATED DADS PROGRAM	75,000
FAMILY SERVICES OF GREATER BATON ROUGE 4727 REVERE AVENUE BATON ROUGE, LA 70808	NONE PUBLIC	HIV/AIDS TRANSPORTATION & VISION ASSISTANCE	20,000.
GIRL SCOUTS - AUDUBON COUNCIL 545 COLONIAL DRIVE BATON ROUGE, LA 70806	NONE PUBLIC	GIRL SCOUT LEADERSHIP EXPERIENCE	30,000.
GULF COAST HOUSING PARTNERSHIP 1614B ORETHA CASTLE HALEY BLVD. NEW ORLEANS, LA 70113	NONE PUBLIC	GCHP-BATON ROUGE AFFORDABLE HOUSING	50,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LOUISIANA ASSOCIATION OF NONPROFIT ORGANIZATIONS 8281 GOODWOOD BLVD, SUITE 1, 70806 P O BOX 66558 BATON ROUGE, LA 70896	NONE PUBLIC	STANDARDS FOR EXCELLENCE PROGRAM IMPROVEMENT	50,000
LOUISIANA HEMOPHILIA FOUNDATION 3636 S SHERWOOD FOREST BLVD, STE 450 BATON ROUGE, LA 70816	NONE PUBLIC	GENERAL OPERATIONS SCHOLARSHIP REIMBURSEMENTS	58,000.
LOUISIANA PUBLIC HEALTH INSTITUTE 1515 POYDRAS, STE 1200 BATON ROUGE, LA 70112	NONE PUBLIC	2011 LCAP CHALLENGE GRANT PROGRAM	15,000
LOUISIANA RESOURCE CENTER FOR EDUCATORS 5550 FLORIDA BLVD, STE D BATON ROUGE, LA 70806	NONE PUBLIC	THE CAREER ACADEMY START-UP FACILITY	70,000
MELROSE EAST INTERFAITH CORPORATION C/O BROADMOOR PRESBYTERIAN CHURCH 9340 FLORIDA BLVD BATON ROUGE, LA 70815	NONE PUBLIC	DAVID PAUL-MELROSE SUMMER CAMP	8,000.
MENTAL HEALTH ASSOCIATION OF GREATER BATON ROUGE 544 COLONIAL DRIVE P.O BOX 64585 BATON ROUGE, LA 70896	NONE PUBLIC	FUND DEVELOPMENT PROGRAM	30,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NEW BEGINNINGS COMMUNITY DEVELOPMENT CORPORATION P O BOX 766 PORT ALLEN, LA 70767	NONE PUBLIC	MENTORING & AFTER-SCHOOL CAPACITY BUILDING	30,000.
POINTE COUPEE BETTER ACCESS COMMUNITY HEALTH PRGM 2100 FALSE RIVER DRIVE, STE A P O. BOX 979 NEW ROADS, LA 70760	NONE PUBLIC	WEEK-END URGENT CARE CLINIC	30,000
RAVENS OUTREACH CENTER, INC 1913 NORTH STREET BATON ROUGE, LA 70802	NONE PUBLIC	(44) PASSENGER BUS ACQUISTION	24,600.
REFINED BY FIRE MINISTRIES 174 HIGHLAND MEADOWS DRIVE JACKSON, LA 70748	NONE PUBLIC	RE-ENTRY BENEFITING FAMILIES	40,000
SALVATION ARMY 7361 AIRLINE HIGHWAY PO BOX 15467 BATON ROUGE, LA 70895-5467	NONE PUBLIC	THE SALVATION ARMY CORPS COMMUNITY CENTER PROGRAM THE SALVATION ARMY'S SCHOOL FOR THE PERFORMING ARTS, CORPS COMMUNITY CENTER & CHRISTMAS ASSISTANCE PROGRAMS	40,000
SBR CHRISTIAN CHILDREN'S FOUNDATION 3180 CONVENTION STREET BATON ROUGE, LA 70806	NONE PUBLIC	SUMMER CAMP GIRLS CLUB EXPANSION	40,900.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SOCIETY OF ST. VINCENT DE PAUL P.O. BOX 127 BATON ROUGE, LA 70821-0127	NONE PUBLIC	FOOD AND HOUSING RESPONSE PROJECT	30,000.
TEACH FOR AMERICA P O. BOX 65148 BATON ROUGE, LA 70896	NONE PUBLIC	STRATEGIC PLACEMENT & INCREASED IMPACT INITIATIVE	50,000
UNITED METHODIST HOPE MINISTRIES 4643 WINBOURNE AVENUE BATON ROUGE, LA 70805	NONE PUBLIC	FUND DEVELOPMENT/EARNED-INCOME CAPACITY BUILDING PREVENT HOMELESSNESS PROMOTE SELF-SUFFICIENCY & DIGNITY	65,000
VOLUNTEERS OF AMERICA 3949 NORTH BLVD BATON ROUGE, LA 70806	NONE PUBLIC	ENHANCING PERMANENT AFFORDABLE HOUSING OPTIONS ENHANCING LIVES THROUGH FULFILLING EMPLOYMENT	70,000
YES I CAN 2561 CITI PLACE COURT SUITE 241 BATON ROUGE, LA 70810	NONE PUBLIC	THE VALLEY PARK ALTERNATIVE SCHOOL	20,000
BATON ROUGE ALLIANCE FOR TRANSITIONAL LIVING P O. BOX 66437 BATON ROUGE, LA 70896	NONE PUBLIC	YOUTH OASIS PROJECT MAKEOVER	31,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BATON ROUGE AREA ALCOHOL & DRUG CENTER, INC. 1819 FLORIDA BLVD BATON ROUGE, LA 70802	NONE PUBLIC	DETOXIFICATION SUSTAINABILITY OF SERVICE	40,000
CAPITAL AREA FAMILY VIOLENCE INTERVENTION CENTER P.O. BOX 52809 BATON ROUGE, LA 70892	NONE PUBLIC	PATHWAYS TO SUCCESS	29,000
BIG BROTHERS-BIG SISTERS OF SOUTHEAST LOUISIANA 12010 LAKELAND PARK BLVD., SUITE 117 BATON ROUGE, LA 70809	NONE PUBLIC	FOSTER GIRLS KINSHIP PROGRAM	15,000.
CAPITAL AREA ALLIANCE FOR THE HOMELESS 5850 FLORIDA BLVD BATON ROUGE, LA 70806	NONE PUBLIC	HOUSING SUPPORT GRANT ONE STOP CENTER START UP	54,000
CENIKOR 2414 BUNKER HILL DRIVE BATON ROUGE, LA 70808	NONE PUBLIC	COUNSELING SERVICES	33,000
BATON ROUGE CHILD ADVOCACY CENTER PO BOX 64740 BATON ROUGE, LA 70896	NONE PUBLIC	DEVELOPMENT AND NEW FACILITY TRANSITION REFURNISHING NEW HOME	31,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
COMMUNITY CARE OUTREACH CENTER 2352 HOSPITAL ROAD NEW ROADS, LA 70760	NONE PUBLIC	DESTINY AFTER-SCHOOL TUTORIAL PROGRAM	30,000.
LOUISIANA INDUSTRIES FOR THE DISABLED 855 ST. FERDINAND STREET BATON ROUGE, LA 70802	NONE PUBLIC	WOMEN'S COMMUNITY REHABILITATION CENTER (WCRC)	50,400
SCHOOLS FOR A NEW MILLENNIUM, INC 1143 NORTH STREET BATON ROUGE, LA 70802	NONE PUBLIC	MIDDLE SCHOOL RENOVATION/ NEW CONSTRUCTION	50,000
SET FREE INDEED MINISTRY INC. 10473 OLD HAMMOND HWY BATON ROUGE, LA 70816	NONE PUBLIC	BELIEVE IN HEALING	35,000.
VOLUNTEER HEALTH CORPS OF BATON ROUGE 12525 PERKINS ROAD, SUITE B BATON ROUGE, LA 70808	NONE PUBLIC	CAPACITY BUILDING	41,500.
YWCA OF GREATER BATON ROUGE 5700 FLORIDA BLVD , SUITE 602 P O. BOX 66435 BATON ROUGE, LA 70896	NONE PUBLIC	PROMISES TO KEEP	68,300

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BATON ROUGE CRISIS INTERVENTION CENTER INC 4837 REVERE AVENUE BATON ROUGE, LA 70808	NONE PUBLIC	FUNDING FOR DEVELOPMENT POSITIONS	45,000.
BATON ROUGE YOUTH COALITION INC 4559 ORCHID ST BATON ROUGE, LA 70808	NONE PUBLIC	2010-2011 BRYC PROGRAM FUNDING	15,000.
BIG BUDDY PROGRAM 1415 MAIN STREET BATON ROUGE, LA 70802	NONE PUBLIC	WORDPLAY TEEN WRITING PROJECT	30,000
CATHOLIC CHARITIES OF THE DIOCESE OF BATON ROUGE 1750 LAUREL STREET BATON ROUGE, LA 70802	NONE PUBLIC	JOSEPH HOMES, INC.	50,000
FACE TO FACE ENRICHMENT CENTER 2010 SOUTH BURNSIDE AVENUE, SUITE A GONZALES, LA 70737	NONE PUBLIC	THE REACH PROGRAM	5,000.
HOSPICE FOUNDATION OF GREATER BATON ROUGE 9063 SEIGEN LANE BATON ROUGE, LA 70810	NONE PUBLIC	THE FUTURE ELECTRONIC HEALTH RECORDS (EHR)	30,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 14 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MARY BIRD PERKINS CANCER CENTER FOUNDATION 4950 ESSEN LANE BATON ROUGE, LA 70809	NONE PUBLIC	CARE NETWORK EARLY DETECTION PROGRAM	25,000.
O'BRIEN HOUSE 1220 MAIN STREET BATON ROUGE, LA 70802	NONE PUBLIC	O'BRIEN HOUSE OUT-PATIENT PROGRAM EXPANSION O'BRIEN HOUSE TECHNOLOGY INITIATIVE	60,000.
PREVENT CHILD ABUSE LOUISIANA 733 E AIRPORT, SUITE 101 BATON ROUGE, LA 70806	NONE PUBLIC	NURTURING THE FAMILIES OF LOUISIANA	25,000.
PUBLIC AFFAIRS RESEARCH COUNCIL OF LOUISIANA 4464 JAMESTOWN AVE., SUITE 300 PO BOX 14776 BATON ROUGE, LA 70898-4776	NONE PUBLIC	HIGH SCHOOL DROPOUT PREVENTION STRATEGIES	25,000
ST VINCENT DEPAUL COMMUNITY PHARMACY INC PO BOX 127 BATON ROUGE, LA 70821	NONE PUBLIC	DIABETIC AND HEART MEDICINE PROJECT	36,000.
		TOTAL CONTRIBUTIONS PAID	2,407,831.

Schedule D Detail of Short-term Capital Gains and Losses

ATTACHMENT 1

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
THRU PIEDMONT PARTNERS LP	VARIOUS	VARIOUS			-13,457
UBS 8R 08559 75 - SEE ATTACHED	VARIOUS	VARIOUS	33,108	32,196	912
UBS 8R 08560 75 - SEE ATTACHED	VARIOUS	VARIOUS	47,980	52,303	-4,323.
UBS 8R 08561 75 - SEE ATTACHED	VARIOUS	VARIOUS	64,306	43,462	20,844
UBS 8R 08562 75 - SEE ATTACHED	VARIOUS	VARIOUS	191,431	152,808	38,623
UBS 8R 08563 75 - SEE ATTACHED	VARIOUS	VARIOUS	744,269	596,094	148,175.
UBS 8R 08565 75 - SEE ATTACHED	VARIOUS	VARIOUS	263,275	250,042	13,233
UBS 8R 08568 75 - SEE ATTACHED	VARIOUS	VARIOUS	585,466	578,460	7,006.
UBS 8R 08569 75 - SEE ATTACHED	VARIOUS	VARIOUS	5,807,732	5,771,466	36,266
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			7,737,567	7,476,831.	247,279.
Totals			7,737,567	7,476,831	247,279.

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Schedule D Detail of Long-term Capital Gains and Losses

ATTACHMENT 2

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
THRU KAYNE ANDERSON	VARIOUS	VARIOUS			46,611
THRU PIEDMONT PARTNERS LP	VARIOUS	VARIOUS			-32,908.
CAPITAL GAIN DISTRIBUTIONS	VARIOUS	VARIOUS	606.	0	606
UBS 8R 08557 75 - SEE ATTACHED	VARIOUS	VARIOUS	818,118.	615,828	202,290
UBS 8R 08559 75 - SEE ATTACHED	VARIOUS	VARIOUS	510,364	443,988	66,376.
1,100 SHS PEOPLE'S UNITED FINANCIAL INC (THRU UBS 08559)	08/13/2007	02/24/2010	17,079.	20,790	-3,711
UBS 8R 08560 75 - SEE ATTACHED	VARIOUS	VARIOUS	327,730	337,874	-10,144
UBS 8R 08561 75 - SEE ATTACHED	VARIOUS	VARIOUS	170,854	156,800	14,054.
SPDR GOLD TRUST PROCEEDS (THRU UBS 08561)	VARIOUS	VARIOUS	191	0	191
UBS 8R 08562 75 - SEE ATTACHED	VARIOUS	VARIOUS	556,615	481,692.	74,923.
UBS 8R 08563 75 - SEE ATTACHED	VARIOUS	VARIOUS	1,209,869	834,156.	375,713
UBS 8R 08564 75 - SEE ATTACHED	VARIOUS	VARIOUS	871,988.	592,148	279,840
UBS 8R 08564 75 - SEE ATTACHED	VARIOUS	VARIOUS	431,804	68,999	362,805
BJ SERVICES/BAKER HUGHES MERGER - ADDL GAIN (THRU UBS 08564)	VARIOUS	VARIOUS	3,310.	0.	3,310
UBS 8R 08565 75 - SEE ATTACHED	VARIOUS	VARIOUS	807,821	799,263	8,558
UBS 8R 08568 75 - SEE ATTACHED	VARIOUS	VARIOUS	449,926	364,474.	85,452
UBS 8R 08569 75 - SEE ATTACHED	VARIOUS	VARIOUS	526,625.	496,092	30,533
TELECORDIA CONSENT TO CHANGE TERMS PAYMENT (THRU UBS 08569)	VARIOUS	VARIOUS	25,000.	0	25,000
GAIN ON DISPOSITION - PIEDMONT PARTNERS, LP	VARIOUS	VARIOUS			40,229.
DE SHAW COMPOSITE INTERNATIONAL FUND RETURN OF CAPITAL	VARIOUS	VARIOUS	2,606,670.	2,606,670	0
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			9,334,570	7,818,774	1,569,728.
			9,334,570		
Totals				7,818,774	1,569,728.

• If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box ▶ [X]

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

• If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1)

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print	Name of exempt organization THE HUEY & ANGELINA WILSON FOUNDATION	**Employer identification number** 58-1714586
File by the extended due date for filing your return See instructions	Number, street, and room or suite no If a P O box, see instructions 3636 SOUTH SHERWOOD FOREST BLVD., SUITE 650	
	City, town or post office, state, and ZIP code For a foreign address, see instructions BATON ROUGE, LA 70816	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

• The books are in the care of ▶ HUEY WILSON INTERESTS, INC.

Telephone No. ▶ 225 292-1344 FAX No ▶ 225 292-1589

• If the organization does not have an office or place of business in the United States, check this box . . . . ▶ [ ]

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box . . . . . . ▶ [ ] . If it is for part of the group, check this box . . . . ▶ [ ] and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until 11/15 , 20 11

5 For calendar year 2010 , or other tax year beginning ______ , 20 ___ , and ending ______ , 20 ___ .

6 If the tax year entered in line 5 is for less than 12 months, check reason [ ] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension ADDITIONAL TIME IS NEEDED TO COLLECT ALL THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions.	8a	$ 30,000.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	$ 147,572.
c	**Balance Due.** Subtract line 8b from line 8a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	$

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ▶ Title ▶ CPA Date ▶ 08/05/2011

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