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Return of Private Foundation

OMB No 1545-0052

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

2010

Department of the Treasury
Internal Revenue Service

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

For calendar year 2010, or tax year beginning FEB 1, 2010, and ending JAN 31, 2011

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 WILKINSON FOUNDATION		A Employer identification number 38-6497639
Number and street (or P O box number if mail is not delivered to street address) 3435 PACIFIC AVENUE	Room/suite	B Telephone number 415-567-5673
City or town, state, and ZIP code SAN FRANCISCO, CA 94118		C If exemption application is pending, 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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 5,729,623.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
(Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received					
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		1,875.	1,875.	0.	STATEMENT 1
4 Dividends and interest from securities		108,661.	108,661.	0.	STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		8,286.			
b Gross sales price for all assets on line 6a	1,231,939.				
7 Capital gain net income (from Part IV, line 2)			8,286.		
8 Net short-term capital gain				N/A	
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		45,272.	0.	45,272.	STATEMENT 3
12 Total. Add lines 1 through 11		164,094.	118,822.	45,272.	
13 Compensation of officers, directors, trustees, etc		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees	STMT 4	4,800.	2,400.	0.	2,400.
c Other professional fees	STMT 5	13,717.	13,717.	0.	0.
17 Interest					
18 Taxes		8,193.	8,193.	0.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		2,718.	0.	0.	2,718.
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses. Add lines 13 through 23		29,428.	24,310.	0.	5,118.
25 Contributions, gifts, grants paid		231,500.			231,500.
26 Total expenses and disbursements. Add lines 24 and 25		260,928.	24,310.	0.	236,618.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-96,834.			
b Net investment income (if negative, enter -0-)			94,512.		
c Adjusted net income (if negative, enter -0-)				45,272.	

G14 6

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	259,331.	278,483.	278,483.
	2 Savings and temporary cash investments			
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 7	3,318,606.	3,130,311.	3,704,107.
	c Investments - corporate bonds STMT 8	1,576,810.	1,649,119.	1,747,033.
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	5,154,747.	5,057,913.	5,729,623.	
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			
	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 ▶ ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	27 Capital stock, trust principal, or current funds	1,735,956.	1,735,956.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	267,865.	267,865.	
	29 Retained earnings, accumulated income, endowment, or other funds	3,150,926.	3,054,092.	
	30 Total net assets or fund balances	5,154,747.	5,057,913.	
31 Total liabilities and net assets/fund balances	5,154,747.	5,057,913.		

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	5,154,747.
2 Enter amount from Part I, line 27a	2	-96,834.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	5,057,913.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,057,913.

Form 990-PF (2010)

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 ATTACHED STATEMENTS	P	VARIOUS	VARIOUS
b SEE ATTACHED STATEMENTS	P	VARIOUS	VARIOUS
c CAPITAL GAIN DIVIDENDS	P	VARIOUS	VARIOUS
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 560,892.		529,586.	31,306.
b 626,062.		694,067.	-68,005.
c 44,985.			44,985.
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))
(j) F.M.V. as of 12/31/69	(i) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			31,306.
b			-68,005.
c			44,985.
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	8,286.
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). If (loss), enter -0- in Part I, line 8	{ }	3	76,291.

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 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	205,566.	4,662,063.	.044093
2008	152,779.	5,207,960.	.029336
2007	386,036.	6,392,992.	.060384
2006	261,612.	6,047,627.	.043259
2005	242,581.	5,716,664.	.042434

2 Total of line 1, column (d)	2	.219506
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	.043901
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	5,350,356.
5 Multiply line 4 by line 3	5	234,886.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	945.
7 Add lines 5 and 6	7	235,831.
8 Enter qualifying distributions from Part XII, line 4	8	236,618.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see 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	945.
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	945.
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	945.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010		6a	1,116.
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	1,116.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached		8	3.
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	168.
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax ☐ 0. Refunded ☒		11	168.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MI		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Form 990-PF (2010)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>MR BARY WILKINSON</u> Telephone no. ► <u>415-567-5673</u> Located at ► <u>3435 PACIFIC AVE, SAN FRANCISCO, CA</u> ZIP+4 ► <u>94118</u>			
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			
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? 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 ►	16	Yes	No X

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)? Organizations relying on a current notice regarding disaster assistance check here ► <u>N/A</u>	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 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 instructions.) <u>N/A</u>	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) <u>N/A</u>	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

Form 990-PF (2010)

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)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

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?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?**6b**☒

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?

N/A

7b**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

Form 990-PF (2010)

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. 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

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	

Summary of Program-Related Investments

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 instructions.	
3	
Total. Add lines 1 through 3	0.

Form 990-PF (2010)

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	5,383,737.
b	Average of monthly cash balances	1b	48,097.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,431,834.
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	5,431,834.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	81,478.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,350,356.
6	Minimum investment return Enter 5% of line 5	6	267,518.

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	267,518.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	945.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	945.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	266,573.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	266,573.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	266,573.

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	236,618.
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	236,618.
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	5	945.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	235,673.

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.

Form 990-PF (2010)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				266,573.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			51,060.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ \$ 236,618.				
a Applied to 2009, but not more than line 2a			51,060.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2010 distributable amount				185,558.
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		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				81,015.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
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				

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 ATTACHED				231,500.
Total				231,500.
b Approved for future payment NONE				
Total				0.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
FIDELITY	1,875.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	1,875.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
FIDELITY	108,661.	0.	108,661.
TOTAL TO FM 990-PF, PART I, LN 4	108,661.	0.	108,661.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISC INCOME FROM CHECKS WRITTEN OFF	672.	0.	672.
DISTRIBUTION FROM TRUST	44,600.	0.	44,600.
TOTAL TO FORM 990-PF, PART I, LINE 11	45,272.	0.	45,272.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,800.	2,400.	0.	2,400.
TO FORM 990-PF, PG 1, LN 16B	4,800.	2,400.	0.	2,400.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BROKER FEES	13,717.	13,717.	0.	0.	
TO FORM 990-PF, PG 1, LN 16C	13,717.	13,717.	0.	0.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL TAXES	8,193.	8,193.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	8,193.	8,193.	0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
FIDELITY	3,130,311.	3,704,107.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,130,311.	3,704,107.		

FORM 990-PF	CORPORATE BONDS		STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
FIDELITY	1,649,119.	1,747,033.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,649,119.	1,747,033.		

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 9
TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
WARREN S WILKINSON 2 WOODLAND PLACE GROSSE POINTE, MI 48230	TRUSTEE 0.50	0.	0.	0.
GUERIN S WILKINSON 2170 S ZEEB ROAD ANN ARBOR, MI 48103	TRUSTEE 0.50	0.	0.	0.
TOM S WILKINSON 708 PARKMAN BLOOMFIELD HILLS, MI 48304	TRUSTEE 0.50	0.	0.	0.
BRUCE WILKINSON 2123 GRANDVIEW STREET ST LOUIS, MO 63131	TRUSTEE 0.50	0.	0.	0.
DR STEPHEN WILKINSON 915 UPPER BRANCH MARSHALL, MI 49068	TRUSTEE 0.50	0.	0.	0.
BARY WILKINSON 3435 PACIFIC AVE SAN FRANCISCO, CA 94118	TRUSTEE 0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

Wilkinson Foundation
EIN# 38-6497639
Grants and Contributions Paid During the Year
Year Ended 1/31/2011

Recipient Name and Address	Recipient Status	Recipient Relationship and Purpose of Grant	Amount
P O Box 131037 Ann Arbor MI 48113		General Charitable Purpose	
Gleaners Community Food Bank 2131 Beaufast Detroit, MI 48207	501 (C)(3)	None General Charitable Purpose	2,000 00
Good Shepherd Food Bank 111 Pine Tree Industrial Parkway Portland, Maine 04102	501 (C)(3)	None General Charitable Purpose	1,000 00
Grand Valley State University 1 Campus Drive Allendale, MI 49401	501 (C)(3)	None General Charitable Purpose	2,000 00
Greater Boston Foodbank 99 Atkinson Street Boston, MA 02118	501 (C)(3)	None General Charitable Purpose	2,000 00
Grosse Pointe Crisis Club Fisher Road Grosse Pointe, MI 48230	501 (C)(3)	None General Charitable Purpose	2,500 00
Grosse Pointe Library Foundation 15450 E Jefferson Ave #150 Grosse Pointe Park, MI 48230	501 (C)(3)	None General Charitable Purpose	5,000 00
Grosse Pointe Historical Society 381 Kercheval Ave Grosse Pointe Farms, MI 48238	501 (C)(3)	None General Charitable Purpose	10,000 00
Habitat for Humanity 618 S Creyts Rd, Suite C Lansing, MI 48917	501 (C)(3)	None General Charitable Purpose	800 00
Harvard College Fund 124 Mt Auburn St Cambridge, MA 02138-5762	501 (C)(3)	None General Charitable Purpose	2,000 00
Heifer International 1 World Avenue Little Rock, AK 72202	501 (C)(3)	None General Charitable Purpose	1,500 00
Hillsdale College 33 East College St Hillsdale, MI 48242	501 (C)(3)	None General Charitable Purpose	2,500 00
Hollis Elementary School 554 River Road Hollis, ME 04042	501 (C)(3)	None General Charitable Purpose	1,000 00
Hotchkiss School PO Box 800 Lakeville, CT 06039-8978	501 (C)(3)	None General Charitable Purpose	2,500 00
Housing Corporation of Arlington 20 Academy St, Suite 203 Arlington, MA 02476	501 (C)(3)	None General Charitable Purpose	2,000 00
Humane Society of Macomb 11350 22 Mile Road Shelby Township, MI 48317-2804	501 (C)(3)	None General Charitable Purpose	2,500 00
Huron River Watershed Council 1100 N. Main, Suite 120 Ann Arbor, MI 48104	501 (C)(3)	None General Charitable Purpose	1,000 00
inMotion 70 West 38th Street, Suite 803 New York, NY 10018	501 (C)(3)	None General Charitable Purpose	500 00
International Community Foundation 2505 N Avenue National City, CA 91950	501 (C)(3)	None General Charitable Purpose	13,000 00
Jane Goodhall Institute 4245 North Fairfax Drive, Suite 600 Arlington, VA 22203	501 (C)(3)	None General Charitable Purpose	250 00
Leader Dogs for the Blind 1039 S. Rochester Road Rochester, MI 48307	501 (C)(3)	None General Charitable Purpose	4,500 00
Leavitt Mill Health Center 1013 Narragansett Trail Buxton, Me. 04093	501 (C)(3)	None General Charitable Purpose	1,000 00
Madison County Animal Shelter 389 Long Branch Road Marshall, NC 28753	501 (C)(3)	None General Charitable Purpose	1,000.00
Madison City Arts Center 90 South Main Street Marshall, NC 28753	501 (C)(3)	None General Charitable Purpose	1,000 00
Maine Children's Cancer Fund 100 Campus Drive, Suite 107 Scarborough, ME 04074	501 (C)(3)	None General Charitable Purpose	500.00

Wilkinson Foundation
EIN# 38-6497639
Grants and Contributions Paid During the Year
Year Ended 1/31/2011

Recipient Name and Address	Recipient Status	Recipient Relationship and Purpose of Grant	Amount
African Wildlife Foundation Washington, DC	501 (C)(3)	None General Charitable Purpose	2,000.00
Alternative for Community and Environment 2181 Washington Street Boston, MA 02119	501 (C)(3)	None General Charitable Purpose	3,000.00
American Red Cross Southeastern Michigan Chapter PO Box 44110 Detroit, MI 48244	501 (C)(3)	None General Charitable Purpose	250.00
Americare 88 Hamilton Ave Stamford, CT 06902	501 (C)(3)	None General Charitable Purpose	4,000.00
Arlington Education Foundation Arlington, VA 22201	501 (C)(3)	None General Charitable Purpose	7,000.00
Arlington Food Pantry 670R Massachusetts Ave Arlington, MA 02476	501 (C)(3)	None General Charitable Purpose	2,000.00
ASPCA 424 E 92nd Street New York, NY 10128	501 (C)(3)	None General Charitable Purpose	500.00
Avalon Housing 404 W Washington Ave Ann Arbor, MI 48103	501 (C)(3)	None General Charitable Purpose	4,000.00
Beneficial Animal Teaching Study (BATS) 217 N. Oak Ave Mineral Wells, TX 76067-4946	501 (C)(3)	None General Charitable Purpose	2,000.00
Bell Isle Botanical Society 810 East Jefferson Ave Detroit, MI 48214	501 (C)(3)	None General Charitable Purpose	1,000.00
Blessing in a Backpack 1839 Bornwmsboro Rd Louisville, KY 40208	501 (C)(3)	None General Charitable Purpose	1,000.00
Capuchin Soup Kitchen 4390 Conner Ave Detroit, MI 481215	501 (C)(3)	None General Charitable Purpose	1,250.00
Cathedral School Annual Giving 1275 Sacramento Street San Francisco, CA 94108	501 (C)(3)	None General Charitable Purpose	5,500.00
Chelsea Center for the Development of Arts 400 Congdon Street Chelsea, MI 48118	501 (C)(3)	None General Charitable Purpose	1,200.00
Chelsea Grace Clinic 1620 Commerce Park Drive Chelsea, MI 48118	501 (C)(3)	None General Charitable Purpose	1,200.00
COTS 26 Peterboro Detroit, MI 48201-2757	501 (C)(3)	None General Charitable Purpose	4,500.00
Covenant Christian School 2143 North Ballas Road St. Louis, MO 63131	501 (C)(3)	None General Charitable Purpose	17,000.00
Detroit Public Television 1 Clover Court Wixom, MI 48393-2247	501 (C)(3)	None General Charitable Purpose	500.00
Detroit Zoological Society 8450 West 10 Mile Road Royal Oak, MI 48067	501 (C)(3)	None General Charitable Purpose	1,000.00
Doctors Without Borders P.O. Box 5030 Hagerstown, MD 21741-5030	501 (C)(3)	None General Charitable Purpose	2,000.00
Ele's Place 1145 W Oakland Ave Lansing, MI 48915-2080	501 (C)(3)	None General Charitable Purpose	1,000.00
Farm Sanctuary P.O. box 150 Watkins Glen, N.Y. 14891	501 (C)(3)	None General Charitable Purpose	1,700.00
Foundation for Economic Education 30 South Broadway Irvington-on-Hudson, NY 10533	501 (C)(3)	None General Charitable Purpose	2,000.00
Fine Arts League of the Carolinas 362 Depot Street Asheville, NC 28801	501 (C)(3)	None General Charitable Purpose	3,000.00
Food Gatherers	501 (C)(3)	None	2,500.00

Wilkinson Foundation
EIN# 38-6497639
Grants and Contributions Paid During the Year
Year Ended 1/31/2011

Recipient Name and Address	Recipient Status	Recipient Relationship and Purpose of Grant	Amount
Maine Public Radio 309 Marginal Way Portland, ME 04101	501 (C)(3)	None General Charitable Purpose	500.00
Margaret Fuller House 71 Cherry St. Cambridge, MA 02139	501 (C)(3)	None General Charitable Purpose	2,000.00
Michigan Humane Society 7401 Chrysler Drive Detroit, MI 48211	501 (C)(3)	None General Charitable Purpose	1,000.00
Michigan Red Cross 100 Mack Ave. Detroit, MI 48201	501 (C)(3)	None General Charitable Purpose	3,500.00
Michigan School of Professional Psychiatry 26811 Orchard Lake Road Farmington Hills, MI 48334	501 (C)(3)	None General Charitable Purpose	2,000.00
National Parks Conservation 1300 18th Street Washington DC 20036	501 (C)(3)	None General Charitable Purpose	500.00
National Wildlife Foundation 213 W Liberty St, #200 Ann Arbor, MI 48104	501 (C)(3)	None General Charitable Purpose	250.00
New England Grass Roots Environ Fund PO Box 1057 Montpelier, VT 05601	501 (C)(3)	None General Charitable Purpose	4,000.00
Neighbors in Need PO Box 64 Marshall, NC 28753	501 (C)(3)	None General Charitable Purpose	1,000.00
Northern Michigan University 1401 Presque Isle Avenue Marquette, MI 49855	501 (C)(3)	None General Charitable Purpose	4,000.00
National Peace Corps Association 1900 St NE, Suite 205 Washington, DC 20036	501 (C)(3)	None General Charitable Purpose	250.00
Old Newsboys of Detroit (Goodfellows) PO Box 44444 Detroit, MI 48244	501 (C)(3)	None General Charitable Purpose	500.00
Oxfam 26 West Street Boston, MA 02111	501 (C)(3)	None General Charitable Purpose	250.00
Ozone House 1705 Washtenaw Ave. Ann Arbor, MI 48104	501 (C)(3)	None General Charitable Purpose	1,000.00
Peace Corps 1300 18th Street Washington, D.C. 20036	501 (C)(3)	None General Charitable Purpose	1,000.00
Political Economic Research Center (PERC) 502 South 18th Ave., Suite 211 Bozeman, MT 59718	501 (C)(3)	None General Charitable Purpose	2,000.00
Rainbow Connection 77 South Main St Box 68 Mount Clemens, MI 48046-6879	501 (C)(3)	None General Charitable Purpose	6,000.00
Raquet Up PO Box 11044 Detroit, MI 48211	501 (C)(3)	None General Charitable Purpose	2,000.00
Saco River Grange Hall Saco River, ME	501 (C)(3)	None General Charitable Purpose	5,000.00
Salvation Army 16030 Northland Drive Southfield, MI 48075	501 (C)(3)	None General Charitable Purpose	6,000.00
San Francisco Parks Trust 501 Stanyan Street San Francisco, CA 94117	501 (C)(3)	None General Charitable Purpose	5,000.00
Santa Catalina School 1500 Mark Thomas Dr. Monterey, CA 93940	501 (C)(3)	None General Charitable Purpose	1,000.00
Schools Administration District (Hollis) PO Box 38 Bar Mills, ME 04004	501 (C)(3)	None General Charitable Purpose	12,500.00
Services For Older Citizens 17150 Waterloos Grosse Pointe, MI 48230	501 (C)(3)	None General Charitable Purpose	5,000.00
Sierra Club Foundation 85 Second Street, Second Floor San Francisco, CA 94105	501 (C)(3)	None General Charitable Purpose	1,000.00

Wilkinson Foundation
EIN# 38-8497639
Grants and Contributions Paid During the Year
Year Ended 1/31/2011

Recipient Name and Address	Recipient Status	Recipient Relationship and Purpose of Grant	Amount
Siskiyou Project 9335 Takilma Road Cave Junction, OR 97523	501 (C)(3)	None General Charitable Purpose	500 00
St Louis Center 18195 Old US 12 Chelsea, MI 48118	501 (C)(3)	None General Charitable Purpose	2,000 00
St Luke's School 1755 Caly St San Francisco, CA 94109	501 (C)(3)	None General Charitable Purpose	7,350 00
Think Detroit 111 W Willis Detroit, MI 48201	501 (C)(3)	None General Charitable Purpose	500 00
Thunderbird (AGSOM) 15249 N. 59th Avenue Glendale, AZ 85306-6000 USA	501 (C)(3)	None General Charitable Purpose	1,150 00
United Way 1212 Griswold Detroit, MI 48226	501 (C)(3)	None General Charitable Purpose	1,500 00
Vanderbilt 5209 Medical Center East Nashville, TN 37232 (8802)	501 (C)(3)	None General Charitable Purpose	3,000 00
Washington Univ. One Brookings Drive St. Louis, MO 63130	501 (C)(3)	None General Charitable Purpose	500 00
Waynelete School 360 Spring Street Portland, ME 04102	501 (C)(3)	None General Charitable Purpose	1,000 00
WDET 101.9 Radio 4800 Cass Ave Detroit, MI 48201	501 (C)(3)	None General Charitable Purpose	250 00
WFMU (Auricle Communications) 43 Montgomery Street Jersey City, NJ 07302	501 (C)(3)	None General Charitable Purpose	300.00
William Beaumont Hospital 468 Cadieux Grosse Pointe, MI 48230	501 (C)(3)	None General Charitable Purpose	5,000 00
World Wildlife Fund PO Box 803 New Haven, CT 06503	501 (C)(3)	None General Charitable Purpose	1,500 00
Youth and Adult Health 11 State House Station Augusta, Maine 04333	501 (C)(3)	None General Charitable Purpose	1,000 00
Youth Dance Theatre of MI PO Box 5 Chelsea, MI 48118	501 (C)(4)	None General Charitable Purpose	5,550 00
Total			<u>231,500 00</u>