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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

2011

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

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  
The Wisdom Connection Inc

**A Employer identification number**  
20-0288195

Number and street (or P O box number if mail is not delivered to street address)  
333 Atherton Way

Room/suite

**B Telephone number** (see page 10 of the instructions)  
(802) 533-2478

City or town, state, and ZIP code  
Greensboro, VT 05841

**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)  
\$ 2,478,974

**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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities. . . . .	75,132	75,132		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 	33,310			
	b Gross sales price for all assets on line 6a _____ 914,616				
	7 Capital gain net income (from Part IV, line 2) . . . .		33,310		
	8 Net short-term capital gain . . . . .				
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold . . . . .				
	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	108,442	108,442		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages . . . . .	34,615			34,615
	15 Pension plans, employee benefits . . . . .	4,248			4,248
	16a Legal fees (attach schedule). . . . .				
	b Accounting fees (attach schedule). . . . .				
	c Other professional fees (attach schedule) . . . . . 	26,506	26,506		
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see page 14 of the instructions) 	684	284		
	19 Depreciation (attach schedule) and depletion . . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule). . . . . 	35,832	7		35,825
	24 <b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	101,885	26,797		74,688
	25 Contributions, gifts, grants paid . . . . .	111,875			111,875
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	213,760	26,797		186,563
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-105,318			
	b <b>Net investment income</b> (if negative, enter -0-)		81,645		
	c <b>Adjusted net income</b> (if negative, enter -0-)				

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Cat No 11289X

Form **990-PF** (2011)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .			
	2	Savings and temporary cash investments . . . . .	61,517	51,545	51,545
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .	2,382,843 <input checked="" type="checkbox"/>	2,287,497	2,427,429
	c	Investments—corporate bonds (attach schedule). . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	2,444,360	2,339,042	2,478,974
	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .		0	
Net Assets or Fund Balances		<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	27	Capital stock, trust principal, or current funds . . . . .			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	2,444,360	2,339,042	
	30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	2,444,360	2,339,042	
	31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	2,444,360	2,339,042	

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	2,444,360
2	Enter amount from Part I, line 27a . . . . .	2	-105,318
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3 . . . . .	4	2,339,042
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	2,339,042

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 )
1 a Publicly-traded Securities				
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 914,616		881,306	33,310
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			33,310
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	33,310
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))
2010	188,917	2,569,143	000 073533
2009	180,788	2,377,660	000 076036
2008	152,723	3,005,576	000 050813
2007	54,215	3,440,462	000 015758
2006			

2 Total of line 1, column (d). . . . .	2	000 216140
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	000 054035
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5. . . . .	4	2,636,487
5 Multiply line 4 by line 3. . . . .	5	142,463
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	816
7 Add lines 5 and 6. . . . .	7	143,279
8 Enter qualifying distributions from Part XII, line 4. . . . .	8	186,563

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

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

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		1	816
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	816
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	816
6		Credits/Payments			
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	662		
b	Exempt foreign organizations—tax withheld at source . . . . .	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	154		
d	Backup withholding erroneously withheld . . . . .	6d			
7		Total credits and payments Add lines 6a through 6d. . . . .		7	816
8		Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .		10	
11		Enter the amount of line 10 to be Credited to 2012 estimated tax Refunded		11	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year? . . . . .	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year? . . . . .	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none"><li>By language in the governing instrument, or</li><li>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? . . . . .</li></ul>	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV . . . . .	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of Foundation Source Telephone no (800) 839-1754 Located at 501 Silverside Road Suite 123 Wilmington DE ZIP+4 198091377			
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 2011, 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	Yes	No
See 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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 ).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions ).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2011 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 2011.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		No

Part VII-B

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

5a

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

(1)

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

YesNo

(2)

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

YesNo

(3)

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

YesNo

(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).

YesNo

(5)

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

YesNo

5b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.

YesNo

6a

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

YesNo

6b

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

YesNo

7a

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

YesNo

7b

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

YesNo

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

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

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.

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
Total number of others receiving over \$50,000 for professional services. . . . .		

Part IX-A

Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

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



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	2,621,015
b	Average of monthly cash balances. . . . .	1b	55,622
c	Fair market value of all other assets (see page 24 of the instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	2,676,637
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	
3	Subtract line 2 from line 1d. . . . .	3	2,676,637
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions) . . . . .	4	40,150
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,636,487
6	Minimum investment return. Enter 5% of line 5. . . . .	6	131,824

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	131,824
2a	Tax on investment income for 2011 from Part VI, line 5. . . . .	2a	816
b	Income tax for 2011 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	816
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	131,008
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	131,008
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	131,008

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	186,563
b	Program-related investments—total from Part IX-B. . . . .	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	186,563
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	816
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	185,747
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 2010	(c) 2010	(d) 2011
1	Distributable amount for 2011 from Part XI, line 7				131,008
2	Undistributed income, if any, as of the end of 2011				
a	Enter amount for 2010 only. . . . .				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2011				
a	From 2006. . . . .				
b	From 2007. . . . .				
c	From 2008. . . . .				
d	From 2009. . . . .				
e	From 2010. . . . . 25,013				
f	Total of lines 3a through e. . . . .	25,013			
4	Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 186,563				
a	Applied to 2010, but not more than line 2a				
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 2011 distributable amount. . . . .				131,008
e	Remaining amount distributed out of corpus	55,555			
5	Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	80,568			
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 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions . . . . .				
f	Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011. . . . .				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions). . . . .				
8	Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions). . . . .				
9	Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a. . . . .	80,568			
10	Analysis of line 9				
a	Excess from 2007. . . .				
b	Excess from 2008. . . .				
c	Excess from 2009. . . .				
d	Excess from 2010. . . . 25,013				
e	Excess from 2011. . . . 55,555				

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2011	(b) 2010	(c) 2009	(d) 2008	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

NONE

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	111,875
b Approved for future payment				
Total . . . . .			3b	

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	
<b>1</b> Program service revenue					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>f</b> _____					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments. . . .					
<b>3</b> Interest on savings and temporary cash investments					
<b>4</b> Dividends and interest from securities. . . .			14	75,132	
<b>5</b> Net rental income or (loss) from real estate					
<b>a</b> Debt-financed property. . . . .					
<b>b</b> Not debt-financed property. . . . .					
<b>6</b> Net rental income or (loss) from personal property					
<b>7</b> Other investment income. . . . .					
<b>8</b> Gain or (loss) from sales of assets other than inventory			18	33,310	
<b>9</b> Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory. .					
<b>11</b> Other revenue <b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>12</b> Subtotal. Add columns (b), (d), and (e). .				108,442	
<b>13 Total.</b> Add line 12, columns (b), (d), and (e). . . . .			<b>13</b>		108,442

[illegible]





## Part XVII

<b>1</b> 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?		<b>Yes</b>	<b>No</b>
<b>a</b>	Transfers from the reporting foundation to a noncharitable exempt organization of		
<b>(1)</b>	Cash. . . . .	<b>1a(1)</b>	<b>No</b>
<b>(2)</b>	Other assets. . . . .	<b>1a(2)</b>	<b>No</b>
<b>b</b>	Other transactions		
<b>(1)</b>	Sales of assets to a noncharitable exempt organization. . . . .	<b>1b(1)</b>	<b>No</b>
<b>(2)</b>	Purchases of assets from a noncharitable exempt organization. . . . .	<b>1b(2)</b>	<b>No</b>
<b>(3)</b>	Rental of facilities, equipment, or other assets. . . . .	<b>1b(3)</b>	<b>No</b>
<b>(4)</b>	Reimbursement arrangements. . . . .	<b>1b(4)</b>	<b>No</b>
<b>(5)</b>	Loans or loan guarantees. . . . .	<b>1b(5)</b>	<b>No</b>
<b>(6)</b>	Performance of services or membership or fundraising solicitations. . . . .	<b>1b(6)</b>	<b>No</b>
<b>c</b>	Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .	<b>1c</b>	<b>No</b>
<b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column <b>(b)</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 <b>(d)</b> the value of the goods, other assets, or services received.			

[illegible]

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

<b>b</b> If "Yes," complete the following schedule		
<b>(a)</b> Name of organization	<b>(b)</b> Type of organization	<b>(c)</b> 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				
	*****			2012-04-30	*****
	Signature of officer or trustee			Date	Title
	Paid Preparer's Use Only	Preparer's Signature  Jeffrey D Haskell		Date  2012-04-30	Check if self-employed <input checked="" type="checkbox"/>
		Firm's name  Foundation Source		Firm's EIN 	
Firm's address  55 Walls Drive Fairfield, CT 06824		Phone no (800) 839-1754			

May the IRS discuss this return with the preparer shown above? See instructions . . . . . ☒ Yes ☐ No

TY 2011 General Explanation Attachment

**Name:** The Wisdom Connection Inc

**EIN:** 20-0288195

**Software ID:** 11000218

**Software Version:** 2011.0.0

Identifier	Return Reference	Explanation
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TY 2011 Investments Corporate  
Stock Schedule

**Name:** The Wisdom Connection Inc

**EIN:** 20-0288195

**Software ID:** 11000218

**Software Version:** 2011.0.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
90 shares of 3M CO MMM	6,760	7,356
79 shares of ABB LTD. ABB	1,814	1,488
141 shares of ABBOTT LABS ABT	6,889	7,928
15 shares of ABERCROMBIE FITCH ANF	1,102	733
30 shares of ABOVENET INC ABVT	1,800	1,950
19 shares of ACACIA RESEARCH CORPORATION - COMMON STOCK 0.001 ACTG	654	694
82 shares of ACCENTURE PLC ACN	3,188	4,365
170 shares of ACE LTD ACE	9,287	11,920
238 shares of ACTUATE CORPORATION BIRT	1,205	1,395
118 shares of ACXIOM CORPORATION ACXM	1,790	1,441
107 shares of ADIDAS-SALOMON AG ADDYY.PK	3,243	3,489
140 shares of ADOBE SYSTEMS, INC. ADBE	4,409	3,958
228 shares of AETNA INC. NEW AET	7,677	9,619
22 shares of AIR PRODS CHEM INC. APD	1,696	1,874
8 shares of ALLERGAN INC. AGN	593	702
63 shares of ALLSCRIPTS HEALTHCARE SOLUTIONS MDRX	1,238	1,193
71 shares of ALTERRA CAPITAL HOLDINGS LTD ALTE	1,518	1,678
60 shares of ALTRIA GROUP INC MO	1,600	1,779
36 shares of AMADEUS IT HLDS SA AMADY.PK	604	585
20 shares of AMAZON COM AMZN	3,044	3,462
132 shares of AMER EQ INV LIFE HLD AEL	1,526	1,373
118 shares of AMERICA MOVIL SA AMX	3,012	2,667
23 shares of AMERICAN TOWER REIT INC AMT	1,217	1,380
102 shares of AMPHENOL CORPORATION APH	3,510	4,630
58 shares of ANNALY MTG MGMT INC. COM NLY	1,042	926
71 shares of APACHE CORPORATION APA	6,874	6,431
49 shares of APPLE INC. AAPL	8,386	19,844
470 shares of APPLIED MATERIALS INC. AMAT	5,694	5,034
70 shares of ARCH COAL INC. ACI	1,640	1,016
184 shares of ARCHER DANIELS MDLND ADM	5,316	5,262



Name of Stock	End of Year Book Value	End of Year Fair Market Value
56 shares of ARGO GROUP INTERNATIONAL HOLDINGS LTD. AGII	2,006	1,622
10 shares of ARTHROCARE CORPORATION ARTC	284	317
15 shares of ARUBA NEWWORKS INC ARUN	279	278
44 shares of ASML HOLDING NV NY REG SHS ASML	1,473	1,839
27 shares of ASPEN TECHNOLOGY, INC AZPN	471	468
37 shares of ASTRAZENECA AZN	1,781	1,713
118 shares of ATT CORP COM NEW T	3,163	3,568
22 shares of ATLAS AIR WORLDWIDE HOLDINGS AAWW	1,190	845
81 shares of AUSTRALIA N Z ADS ANZBY.PK	1,720	1,686
34 shares of AVAGO TECHNOLOGIES LIMITED AVGO	959	981
123 shares of BAKER HUGHES INTL BHI	7,409	5,983
199 shares of BANCO BRADESCO S.A. SPONS ADR NEW BBD	3,209	3,319
369 shares of BANK NEW YORK MELLON CORP COM BK	9,700	7,347
220 shares of BANK OF AMERICA CORP BAC	3,498	1,223
176 shares of BANK OF CHINA UNSP/ADR BACHY.PK	2,382	1,610
48 shares of BANK OF MONTREAL BMO	2,903	2,631
33 shares of BASF AG SPONS ADR BASFY.PK	2,464	2,301
73 shares of BASIC ENERGY SERVICES INC NEW BAS	1,227	1,438
63 shares of BAXTER INTERNATIONAL INC. BAX	3,476	3,117
37 shares of BAYERISCHE MOTOREN WERKE BAMXY.PK	796	823
28 shares of BCE INC BCE	1,048	1,167
83 shares of BECTON DICKINSON CO BDX	6,614	6,202
85 shares of BERKSHIRE HATHAWAY INC. CLASS B BRK-B	5,736	6,486
20 shares of BG GROUP PLC ADS BRGY.PK	1,715	2,140
28 shares of BHP BILLITON LIMITED BHP	1,253	1,978
49 shares of BHP BILLITON SP ADR BBL	2,887	2,861
10 shares of BLACKROCK INC BLK	1,900	1,782
47 shares of BNP PARIBAS SPONS ADR BNPQY.PK	2,097	924
59 shares of BP PLC SPONSORED ADR BP	2,500	2,522
104 shares of BRAMBLES LTD UNSP AD BMBLY.PK	1,547	1,511

Name of Stock	End of Year Book Value	End of Year Fair Market Value
57 shares of BRITISH AMERICAN TOBACCO PLC BTI	3,661	5,408
37 shares of BROADCOM CORPORATION BRCM	1,168	1,086
28 shares of BROWN TOM INC. TBI	362	389
59 shares of BUCKEYE TECH INC BKI	1,505	1,973
29 shares of BUNZL PLC SPONSORED ADR NEW BZLFY.PK	1,619	1,995
87 shares of C T S CP CTS	842	800
10 shares of CAMERON INTERNATIONAL CORP CAM	532	492
45 shares of CANADIAN NATL RAILWAY CO CNJ	2,922	3,535
56 shares of CANON INC. CAJ	2,432	2,466
52 shares of CAP GEMINI SA UNSP/ADR CGEMY.PK	1,326	817
150 shares of CARDINAL FINANCIAL CORPORATION CFNL	1,637	1,611
40 shares of CARRIZO OIL GAS, INC. CRZO	1,120	1,054
31 shares of CATERPILLAR INC. CAT	3,062	2,809
26 shares of CBS CORP CL B CBS	655	706
19 shares of CELANESE CORPORATION CE	926	841
19 shares of CENOVUS ENERGY INC CVE	410	631
72 shares of CENTRICA PLC S/ADR CPYYY.PK	1,247	1,283
132 shares of CGI GROUP INC CL A SUB VTG SHS GIB	2,708	2,488
34 shares of CHECK POINT SOFTWARE TECHNOLOGIES LTD CHKP	1,866	1,786
346 shares of CHEUNG KONG HLDGS LTD ADR CHEUY.PK	4,340	4,093
88 shares of CHEVRONTXACO CORP CVX	6,451	9,363
21 shares of CHINA MOBILE HKG LTD CHL	999	1,018
26 shares of CHINA PETRO CHEM SNP	2,303	2,731
37 shares of CHUNGHWA TELECOM CO LTD SPONSORED ADR NEW CHT	1,250	1,231
29 shares of CIELO SA ADR CIOXY.PK	664	752
27 shares of CIGNA CI	1,333	1,134
73 shares of CINEMARK HOLDINGS INC CNK	1,299	1,350
41 shares of CISCO SYSTEMS INC CSCO	611	741
33 shares of CLOUD PEAK ENERGY INC CLD	725	638
15 shares of CNOOC LTD ADS CEO	1,447	2,620

Name of Stock	End of Year Book Value	End of Year Fair Market Value
11 shares of COACH INC COH	671	671
74 shares of COCA-COLA AMATIL LTD ADR CCLAY.PK	1,095	1,726
33 shares of COCA-COLA CO KO	2,213	2,309
42 shares of COCA-COLA HELLEN ADS CCH	1,076	701
65 shares of COGENT COMMUNICATIONS GROUP, INC CCOI	1,045	1,098
76 shares of COGNIZANT TECHNOLOGY SOLUTIONS CORPORATION - CLASS CTSH	5,193	4,888
117 shares of COMCAST CORP CMCSK	2,620	2,757
67 shares of COMCAST CORP CL A CMCSA	1,555	1,589
45 shares of COMMUNITY TRUST BANCORP, INC CTBI	1,273	1,324
42 shares of COMP DE BEBA AM ADS ABV	1,471	1,516
28 shares of COMPANHIA SANEA ADS SBS	1,193	1,558
264 shares of COMPASS GROUP PLC ADR CMPGY.PK	1,729	2,503
15 shares of COMPLETE PROD SVCS CPX	432	503
147 shares of CONOCOPHILLIPS COP	8,121	10,712
78 shares of CONVIO, INC CNVO	845	863
88 shares of COOPER INDUSTRIES PLC CBE	4,203	4,765
244 shares of CORNING INC GLW	4,452	3,167
35 shares of CORP OFFICE PPTY TR OFC	1,034	744
19 shares of CORPORATE EXEC BOARD CO EXBD	737	724
53 shares of COVIDIEN LTD COV	2,382	2,386
81 shares of CSX CORP CSX	1,862	1,706
226 shares of CVS CAREMARK CORP. CVS	7,838	9,216
24 shares of CYTEC IND INC CYT	1,065	1,072
60 shares of DANAHER CORP DHR	2,849	2,822
90 shares of DARDEN RESTAURANTS INC. DRI	4,172	4,102
11 shares of DEERE CO DE	1,048	851
103 shares of DENSO CORP ADR DNZOY.PK	1,454	1,408
142 shares of DEVON ENERGY CORPORATION DVN	9,117	8,804
60 shares of DEXCOM, INC. DXCM	478	559
81 shares of DFC GLOBAL CORP DLLR	1,504	1,463

Name of Stock	End of Year Book Value	End of Year Fair Market Value
31 shares of DIAGEO PLC ADS DEO	2,118	2,710
8 shares of DIAMOND FOODS, INC. DMND	259	258
55 shares of DIAMOND OFFSHORE DRL DO	3,371	3,039
95 shares of DIGITALGLOBE, INC DGI	1,615	1,625
46653 shares of DODGE COX INCOME FUND DODIX	587,492	620,485
121 shares of DOLAN MEDIA COMPANY DM	1,062	1,031
32 shares of DOLLAR GENERAL CORP DG	1,238	1,316
60 shares of DOLLAR TREE INC. DLTR	3,364	4,987
87 shares of DUCOMMUN INC DCO	1,894	1,109
99 shares of EATON CORP ETN	4,759	4,309
90 shares of EBAY INC. EBAY	2,779	2,730
55 shares of EBIX INC EBIX	975	1,216
85 shares of ECOLAB INC ECL	4,358	4,914
36 shares of ECOPETROL SA EC	1,545	1,603
47 shares of EMC CORP-MASS EMC	1,005	1,012
92 shares of EMERSON ELECTRIC CO. EMR	3,932	4,286
54 shares of ENCORE CAPITAL GROUP INC ECPG	1,273	1,148
49 shares of ENERSIS S A ENI	1,118	864
153 shares of ERICSSON L M TEL CO ERIC	1,816	1,550
57 shares of EXPRESS SCRIPTS INC. ESRX	2,817	2,547
58 shares of EXXON MOBIL CORP XOM	4,291	4,916
15 shares of EXZCORP INC EZPW	448	396
56 shares of FANUC LIMITED UNSPONSORED FANUY.PK	1,110	1,417
17 shares of FINISAR CORPORATION FNSR	177	285
70 shares of FIRST FINANCIAL BANCORP FFBC	1,080	1,165
70 shares of FIRSTMERIT CORPORATION FMER	1,040	1,059
771 shares of FLEXTRONICS INTERNATIONAL FLEX	5,130	4,364
123 shares of FOCUS MEDIA HLDG LTD ADR FMCN	2,677	2,397
27 shares of FOMENTO ECONOMICO MEXICANO FMX	1,456	1,882
22 shares of FORTINET INC FTNT	463	480

Name of Stock	End of Year Book Value	End of Year Fair Market Value
144 shares of FREEPORT-MCMORAN COPPER GOLD INC. FCX	5,671	5,298
19 shares of FRESENIUS MED CAR AG FMS	965	1,292
15 shares of FUSION-IO INC FIO	369	363
99 shares of GENERAL MILLS INC GIS	3,461	4,001
71 shares of GENTING BERHAD SPONS GEBHY.PK	1,285	1,217
193 shares of GEO GROUP INC THE GEO	3,382	3,233
29 shares of GILEAD SCIENCES INC GILD	1,149	1,187
21 shares of GLAXOSMITHKLINE PLC GSK	935	958
44 shares of GOLDMAN SACHS GROUP GS	7,072	3,979
8 shares of GOODRICH CORPORATION GR	708	990
20 shares of GOOGLE INC CL A GOOG	10,274	12,918
35 shares of GREAT PLAINS ENERGY GXP	709	762
149 shares of GROUPE DANONE ADS DANOY.PK	1,709	1,883
75 shares of GRUPO TELEVISA ADR TV	1,610	1,580
179 shares of HALLIBURTON COMPANY HAL	6,211	6,177
26 shares of HANESBRANDS INC HBI	741	568
115 shares of HANGER ORTHOPEDIC GROUP, INC. HGR	1,900	2,149
94 shares of HASBRO INC HAS	3,386	2,998
195 shares of HEALTHSOUTH CP HLS	3,701	3,446
81 shares of HESS CORP HES	5,391	4,601
10 shares of HMS HOLDINGS CORP HMSY	257	320
146 shares of HONEYWELL INTERNATIONAL INC. HON	6,014	7,935
136 shares of HONGKONG ELEC HLDGS HGKGY.PK	1,004	998
116 shares of HOSPIRA INC W/I HSP	4,960	3,523
39 shares of HSBC HLDGS PLC ADS HBC	1,500	1,486
8 shares of HURON CONSULTING GROUP INC. HURN	304	310
100 shares of HUTCHISON WHAMPOA LTD ADR HUWHY.PK	2,083	1,658
45 shares of IAC/INTERACTIVE CORP IACI	1,542	1,917
30 shares of IBERIABANK CORPORATION IBKC	1,595	1,479
76 shares of ICONIX BRAND GROUP, INC ICON	1,353	1,238

Name of Stock	End of Year Book Value	End of Year Fair Market Value
70 shares of IMPERIAL TOBACCO GRO ITYBY.PK	4,603	5,274
22 shares of INCYTE CORPORATION INCY	343	330
153 shares of INDUSTRIAL COM UNSP/ADR IDCBY.PK	2,198	1,816
25 shares of INFOSYS TECH LTD SPD ADR INFY	1,049	1,285
108 shares of INGERSOL-RAND PLC IR	3,288	3,291
29 shares of INNOSPEC INC IOSP	740	814
20 shares of INSULET CORPORATION PODD	377	377
70 shares of INTEL CORP INTC	1,358	1,698
66 shares of INTER PARFUMS INC. IPAR	1,224	1,027
18 shares of INTERDIGITAL COMMUNICATIONS CORP IDCC	866	784
41 shares of INTERNATIONAL BUSINESS MACHINES IBM	6,175	7,539
23 shares of INTERNATIONAL PAPER CO. IP	594	681
19 shares of INTERNATIONAL POWER IPRPY.PK	870	992
45 shares of JARDEN CORP JAH	1,418	1,345
54 shares of JARDINE STRATEG ADR JSHLY.PK	3,181	2,966
9 shares of JIANGXI COPPER ADR JIXAY.PK	1,278	774
105 shares of JOHNSON JOHNSON JNJ	6,500	6,886
73 shares of JOHNSON CONTROLS INC. JCI	2,629	2,282
178 shares of JP MORGAN CHASE CO JPM	6,822	5,919
201 shares of JULIUS BAER GROUP LTD JBAXY.PK	1,166	1,558
124 shares of KBR INC KBR	2,413	3,456
96 shares of KELLY SERVICES INC CL A KELYA	1,505	1,313
67 shares of KENEXA CORP KNXA	1,749	1,789
106 shares of KEPPEL CORP LTD ADR KPELY.PK	1,709	1,509
101 shares of KEY ENERGY SERVICES INC. KEG	1,155	1,562
192 shares of KINGFISHER PLC KGFHY.PK	1,285	1,476
266 shares of KNOLOGY, INC. KNOL	3,779	3,777
112 shares of KOMATSU LTD. KMTUY.PK	3,281	2,645
89 shares of KONINKLIJKE AHOLD AHONY.PK	1,143	1,197
18 shares of KYOCERA CP KYO	1,825	1,436

Name of Stock	End of Year Book Value	End of Year Fair Market Value
45 shares of LOREAL ADR LRLCY.PK	880	937
23 shares of LAM RESEARCH CORP LRCX	859	851
45 shares of LAS VEGAS SANDS CORP LVS	1,924	1,923
4421 shares of LAZARD EMERGING MARKETS PORTFOLIO OPEN SHARES LZOEX	54,134	76,041
302 shares of LEAPFROG ENTERPRISES INC. LF	1,571	1,688
26 shares of LEAR CORP LEA	1,116	1,035
77 shares of LENOVO GROUP LTD ADR LNVGY.PK	1,088	1,013
13 shares of LIBERTY MEDIA HLDG CAP SER A LCAPA	1,068	1,015
22 shares of LIFE TECHNOLOGIES CORP LIFE	892	856
128 shares of LINCOLN ELECTRIC HOLDING INC. LECO	3,366	5,007
9 shares of LIQUIDITY SERVICES INC LQDT	288	332
180 shares of LKQ CORPORATION - LKQ CORPORATION COMMON STOCK LKQX	4,705	5,414
98 shares of LOCKHEED MARTIN CORP LMT	7,753	7,928
138 shares of LOWES COMPANIES INC. LOW	3,081	3,502
251 shares of LTX-CREDENCE CORPORATION LTXC	1,977	1,343
31 shares of LUKOIL HOLDING CO SP/ADR LUKOY.PK	1,789	1,649
33 shares of MAGELLAN HEALTH SERVICES, INC. MGLN	1,639	1,633
321 shares of MAGNUM HUNTER RESOURCES, INC MHR	1,508	1,730
30 shares of MAKITA CORP MKTAY.PK	1,330	971
29 shares of MARATHON PETROLEUM CORP MPC	912	965
95 shares of MASTEC INC MTZ	1,760	1,650
15 shares of MASTERCARD INC MA	3,461	5,592
21 shares of MCDONALDS CORP MCD	1,572	2,107
186 shares of MEADOWBROOK INS GRP MIG	1,807	1,986
75 shares of MEDCO HEALTH SOLUTIONS INC. MHS	3,372	4,193
247 shares of MEDTRONIC INC MDT	8,373	9,448
39 shares of MERCK KGAA U/ADR MKGAY.PK	1,006	1,296
274 shares of METLIFE INC. MET	9,943	8,543
78 shares of MICROSEMI CORP MSCC	1,413	1,307
154 shares of MICROSOFT CORPORATION MSFT	4,355	3,998

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4 shares of MITSUI COMPANY, LTD. - ADR MITSY	1,344	1,238
28 shares of MOLYCORP INC MCP	1,466	671
13 shares of MONSANTO CO MON	912	911
63 shares of MTN GROUP LTD SPON ADR MTNOY.PK	1,352	1,115
80 shares of MUENCHENER RUECKVERS MURGY.PK	1,240	982
68 shares of NATIONAL AUSTRALIA BK LTD NABZY.PK	1,714	1,627
29 shares of NATIONAL GRID TRANSCO PLC NGG	1,381	1,406
84 shares of NATL OILWELL VARCO NOV	3,948	5,711
95 shares of NAVISTAR INTL CP NAV	4,306	3,599
74 shares of NESTLE S.A. NSRGY.PK	3,082	4,271
37 shares of NETAPP, INC. NTAP	1,502	1,342
11 shares of NETGEAR INC NTGR	418	369
35 shares of NEW ORIENTAL ED TECHNOLOGY GROUP INCSPONSORED AD EDU	1,059	842
49 shares of NEXEN INC NXY	1,076	780
27 shares of NICE SYSTEMS LTD. NICE	778	930
58 shares of NIDEC CORPORATION ADR NJ	874	1,252
56 shares of NIKE INC-CL B NKE	3,535	5,397
83 shares of NIPPON TELEPHONE ADR NTT	1,774	2,102
48 shares of NORFOLK SOUTHERN CORP NSC	2,487	3,497
41 shares of NORTHROP GRUMMAN CORP NOC	1,671	2,398
76 shares of NOVARTIS AG ADR NVS	3,687	4,345
81 shares of NOVO NORDISK A S NVO	4,122	9,336
127 shares of NYSE EURONEXT INC NYX	3,366	3,315
232 shares of OAO GAZPROM SPONS GDR OGZPY.PK	2,972	2,478
36 shares of OASIS PETROLEUM CORP OAS	1,044	1,047
31 shares of OCCIDENTAL PETE CORP OXY	3,015	2,905
52 shares of OCZ TECHNOLOGY GROUP OCZ	396	344
478 shares of OFFICE DEPOT INC ODP	1,204	1,028
131 shares of OFFICEMAX INC OMX	733	595
17 shares of OIL STATES INTL INC OIS	1,047	1,298



Name of Stock	End of Year Book Value	End of Year Fair Market Value
45 shares of OM GROUP INC OMG	1,032	1,008
545 shares of ON SEMICONDUCTOR CORP ONNN	4,478	4,207
13 shares of ONYX PHARMACEUTICALS, INC. ONXX	544	571
21 shares of OPEN TEXT CORP OTEX	1,193	1,074
507 shares of ORACLE CORP ORCL	11,575	13,005
92 shares of ORBITAL SCIENCES CORP ORB	1,511	1,337
44 shares of P P G IND PPG	2,836	3,674
49 shares of PAR PHARMACEUTICAL COMPANIES INC PRX	1,450	1,604
171 shares of PEPSICO INC PEP	10,557	11,346
170 shares of PETROQUEST ENERGY PQ	1,126	1,122
365 shares of PFIZER INC. PFE	6,268	7,899
152 shares of PHILIP MORRIS INTL PM	8,342	11,929
13611 shares of PIMCO INVESTMENT GRADE CORP BOND CLASS A PBDAX	138,818	140,873
13 shares of PIONEER NAT RES CO PXD	1,163	1,163
53 shares of PNC FINANCIAL GROUP INC. PNC	3,113	3,057
15 shares of PORTFOLIO RECOVERY ASSOCIATES, INC. - COMMON STOCK PRAA	1,101	1,013
63 shares of PROCTER GAMBLE CO PG	4,035	4,203
110 shares of PRUDENTIAL FINCL INC PRU	5,687	5,513
57 shares of PRUDENTIAL PLC SC PUK	1,150	1,125
40 shares of PUBLICIS GROUPE S.A PUBGY.PK	931	915
16 shares of PVH CORP PVH	943	1,128
61 shares of QUALCOMM INC QCOM	2,739	3,337
125 shares of RAMCO-GERSHENSON PROPERTIES RPT	1,463	1,229
91 shares of RECKSON ASSOCS RLTY CORP RA	1,290	1,355
62 shares of REED ELSEVIER PLC RUK	2,391	2,000
42 shares of REPUBLIC SVCS INC. RSG	1,313	1,157
21 shares of RIO TINTO PLC SPONSORED ADR RIO	1,098	1,027
41 shares of ROCHE HOLDING LTD ADR RHHBY.PK	1,790	1,745
23 shares of ROCK-TENN CO. RKT	1,336	1,327
20 shares of ROCKWOOD HOLDINGS INC ROC	1,055	787

Name of Stock	End of Year Book Value	End of Year Fair Market Value
53 shares of ROGERS COMM CL B RCI	1,885	2,041
7 shares of ROSETTA RESOURCES INC. ROSE	263	305
28 shares of ROYAL DUTCH SHEL PLC SPONS ADR B RDS-B	1,703	2,128
123 shares of ROYAL DUTCH SHELL PLC RDS-A	8,512	8,990
21 shares of RPC INC RES	454	383
9 shares of SALESFORCE.COM CRM	1,205	913
85 shares of SAMPO OYJ UNSPONSORED ADR SAXPY.PK	1,292	1,048
75 shares of SAP AKTIENGESELL ADS SAP	3,808	3,971
29 shares of SBA COMMUNICATIONS SBAC	1,130	1,246
56 shares of SCHNEIDER ELEC UNSP/ADR SBGSY.PK	689	589
34 shares of SEADRILL LTD SDRL	1,003	1,128
12 shares of SHIRE PHARMACEUTICALS, INC SHPGY.PK	480	1,247
65 shares of SHUTTERFLY, INC. SFLY	1,801	1,479
24 shares of SIEMENS A G ADR SI	2,949	2,295
69 shares of SINGAPORE TELECOM SPD ADR SGAPY SGAPY.PK	1,552	1,648
20 shares of SIRONA DENTAL SYSTEMS INC SIRO	745	881
84 shares of SKYWORKS SOLUTIONS, INC SWKS	1,889	1,362
22 shares of SMITH NEPHEW PLC ADR SNN	958	1,059
35 shares of ST. JUDE MED INC. STJ	1,182	1,201
96 shares of STANLEY BLACK DECKER INC SWK	6,006	6,490
17 shares of STARBUCKS CORP COM SBUX	702	782
90 shares of STATOIL ASA ADS STO	2,307	2,305
101 shares of STERLING CONSTRUCTION COMPANY INC STRL	1,330	1,088
72 shares of STIFEL FINANCIAL CP SF	3,387	2,308
213 shares of SUMITOMO CORP S/ADR SSUMY.PK	2,615	2,876
49 shares of SUNCOR ENERGY INC SU	1,862	1,413
13 shares of SUPERIOR ENERGY SV SPN	389	370
21 shares of SVB FINANCIAL GROUP SIVB	902	1,001
154 shares of SWEDBANK AB S/ADR SWDBY.PK	2,494	1,979
32 shares of SYNGENTA AG ADS SYT	1,418	1,886

Name of Stock	End of Year Book Value	End of Year Fair Market Value
13 shares of SYNTEL INC SYNT	619	608
157 shares of TAIWAN SEMICONDUCTOR MFG CO LTD TSM	1,650	2,027
13 shares of TALEO CORP CL A TLEO	321	503
221 shares of TARGET CORPORATION TGT	11,610	11,320
18 shares of TELEFLEX INC. TFX	912	1,103
157 shares of TELSTRA CORPORATION TLSYY.PK	2,401	2,677
615 shares of TENET HEALTHCARE CORP THC	3,137	3,155
93 shares of TESCO PLC ADR TSCDY.PK	2,119	1,752
222 shares of TEVA PHARMECEUTICAL SP ADR TEVA	10,281	8,960
98 shares of THE MOSAIC CO MOS	6,320	4,942
71 shares of THERMO FISHER SCIENTIFIC INC TMO	3,844	3,193
98 shares of TIME WARNER INC. TWX	2,750	3,542
88 shares of TIME WARNER TELECOM INC. TWTC	1,548	1,705
100 shares of TITAN INTERNATIONAL INC - ILL TWI	2,113	1,946
45 shares of TOLL BROTHERS INC TOL	639	919
56 shares of TORNIER NV TRNX	1,007	1,008
21 shares of TOTAL FINA ELF S.A. TOT	1,020	1,073
69 shares of TOWER GROUP INC TWGP	1,813	1,392
13 shares of TOYOTA MTR CORP TM	1,254	860
47 shares of TRANSCANADA CORP TRP	1,530	2,052
59 shares of TRAVELERS COMPANIES INC THE TRV	3,096	3,491
66 shares of TRIANGLE PETROLEUM CORPORATION TPLM	384	394
53 shares of TRIQUINT SEMICONDUCTOR, INC. TQNT	266	258
14 shares of TRIUMPH GROUP INC TGI	817	818
55 shares of TUPPERWARE COPR TUP	3,600	3,078
81 shares of TYCO INTERNATIONAL LTD. TYC	3,715	3,784
238 shares of UNILEVER N V N Y UN	7,378	8,180
35 shares of UNION PACIFIC UNP	2,203	3,708
48 shares of UNITED CONTINENTAL HOLDINGS UAL	917	906
74 shares of UNITED OVRSEAS BK LTD ADR UOVEY.PK	2,154	1,743

Name of Stock	End of Year Book Value	End of Year Fair Market Value
42 shares of UNITED PARCEL SERVICE UPS	2,804	3,074
40 shares of UNITED RENTALS INC URI	866	1,182
176 shares of UNITED TECHNOLOGIES CORP UTX	11,374	12,864
17 shares of UNITED THERAPEUTICS CORP UTHR	696	803
23 shares of UNITEDHEALTH GROUP INC. UNH	1,174	1,166
26 shares of UNIVERSAL HLTH SVC B UHS	1,006	1,010
24 shares of URS CORP NEW URS	819	843
19 shares of VALE SA VALE	548	408
47 shares of VALE SA PREFERENCE A ADR VALE-P	1,264	968
36 shares of VALIDUS HLDS LTD VR	1,056	1,134
87 shares of VALUECLICK INC VCLK	1,370	1,417
2533 shares of VANGUARD EMERGING MARKETS STOCK INDEX VIPERS VWO	94,840	96,794
3959 shares of VANGUARD GROWTH ETF VUG	205,518	244,532
101 shares of VANGUARD HEALTH SYSTEMS VHS	916	1,032
4808 shares of VANGUARD VALUE ETF VTV	256,627	252,363
46 shares of VERIFONE SYSTEMS INC PAY	2,044	1,634
24 shares of VERISK ANALYTICS, INC VRSK	817	963
64 shares of VIACOM INC. CL B VIA-B	2,894	2,906
61 shares of VIMPELCOM LTD VIP	1,025	578
50 shares of VISA INC V	4,583	5,077
65 shares of VISTAPRINT NV VPRT	1,847	1,989
429 shares of VODAFONE GROUP PLC VOD	10,786	12,025
48 shares of VOLCANO CORPORATION VOLC	1,240	1,142
37 shares of VOLKSWAGEN AG VLKPY.PK	1,319	1,106
36 shares of VOLKSWAGEN AG SPONS ADR VLKAY.PK	1,097	961
57 shares of VOLVO AB ADR B VOLVY.PK	1,017	618
19 shares of WABCO HOLDINGS INC COMMON STOCK WBC	1,311	825
66 shares of WAL-MART STORES INC. WMT	3,224	3,944
177 shares of WALGREEN CO WAG	6,818	5,852
30 shares of WALT DISNEY HOLDINGS CO. DIS	1,028	1,125

Name of Stock	End of Year Book Value	End of Year Fair Market Value
12 shares of WATSON WYATT CO. HOLDINGS TW	542	719
60 shares of WEICHAI POWER CO LTD WEICY.PK	1,325	1,167
233 shares of WELLS FARGO CO. WFC	6,753	6,421
13 shares of WESCO INTL INC WCC	672	689
275 shares of WESTERN UNION CO WU	4,706	5,022
89 shares of WILLIS GROUP HOLDINGS LTD WSH	2,444	3,453
57 shares of WORLEY PARSONS LTD WYGPY.PK	1,740	1,489
30 shares of WPP GROUP PLC WPPGY.PK	2,061	1,567
12 shares of WRIGHT EXPRESS CORP WXS	373	651
15 shares of YAMADA DENKI CO LTD YMDAF.PK	1,258	1,029

**TY 2011 Other Expenses Schedule****Name:** The Wisdom Connection Inc**EIN:** 20-0288195**Software ID:** 11000218**Software Version:** 2011.0.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	15,789			15,789
Bank Charges	7	7		
Payroll Processing Fees	1,276			1,276
Premium Payment for Group Medical Insurance	18,745			18,745
Website Development	15			15

**TY 2011 Other Professional Fees Schedule****Name:** The Wisdom Connection Inc**EIN:** 20-0288195**Software ID:** 11000218**Software Version:** 2011.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management Services	26,506	26,506		

**TY 2011 Taxes Schedule****Name:** The Wisdom Connection Inc**EIN:** 20-0288195**Software ID:** 11000218**Software Version:** 2011.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Estimated Tax for 2011	400	0	0	0
Foreign Tax Paid	284	284	0	0



**Additional Data**

**Software ID:** 11000218  
**Software Version:** 2011.0.0  
**EIN:** 20-0288195  
**Name:** The Wisdom Connection Inc

**Part VI Line 7 - Tax Paid Original Return:** 816


**Form 990PF - Special Condition Description:**

<b>Special Condition Description</b>
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Form 990PF Part VIII Line 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
F William Alley	Director / Treasurer 001 00	0		
333 Atherton Way Greensboro,VT 05841				
Patricia Passmore Alley	President 001 00	0		
333 Atherton Way Greensboro,VT 05841				
Patricia C Heffeman	Board Member 001 00	0		
333 Atherton Way Greensboro,VT 05841				
Sally P Lonegren	Board Member 001 00	0		
333 Atherton Way Greensboro,VT 05841				
Mary Parke Meyer	Secretary 001 00	0		
333 Atherton Way Greensboro,VT 05841				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
A W A R E P O B O X 307 H A R D W I C K , V T 05843	N/A	509(a)(1)	General Unrestricted	7,000
CRAFTSBURY COMMUNITY CARE CENTER1784 E CRAFTSBURY RD CRAFTSBURY, VT 05826	N/A	509(a)(2)	General Unrestricted	1,000
GRASS ROOTS ART AND COMMUNITY EFFORPO BOX 960 H A R D W I C K , V T 05843	N/A	509(a)(1)	General Unrestricted	1,000
GREENSBORO COMMUNITY CHILDCARE CTRPO BOX 65 GREENSBRO BEND, VT 05842	N/A	509(a)(1)	General Unrestricted	7,500
GREENSBORO HOSPITAL ASSOCIATION47 MAGGIES POND RD GREENSBORO, VT 05841	N/A	509(a)(1)	General Unrestricted	7,500
HARDWICK AREA FOOD PANTRY INCPO BOX 1075 H A R D W I C K , V T 05843	N/A	509(a)(1)	General Unrestricted	10,000
LAMOILLE COUNTY COURT DIVERSION PRGPO BOX 148 H Y D E P A R K , V T 05655	N/A	509(a)(1)	Lamoille Valley Mentoring Partnership Program	5,000
PASSAGEWAYS INSTITUTE INC 3050 BROADWAY ST STE 203 B O U L D E R , C O 80304	N/A	509(a)(2)	Heart Science of Teaching Scholarships	6,375
THE CIRCUS BARN INCORPORATED 1 CIRCUS RD G R E E N S B O R O , V T 05841	N/A	509(a)(2)	WW Residency and Families in Need	1,500
VERMONT HUMANITIES COUNCIL 11 LOOMIS ST M O N T P E L I E R , V T 05602	N/A	509(a)(1)	General Unrestricted	5,000
VERMONT RURAL EDUCATION COLLABORATIPO BOX 86 C A B O T , V T 05647	N/A	509(a)(1)	Youths and Adults Transforming Schools Together Program	6,000
VERMONT RURAL EDUCATION COLLABORATIPO BOX 86 C A B O T , V T 05647	N/A	509(a)(1)	Charitable Event	12,000
VERMONT YOUTH CONSERVATION CORPS IN1949 E MAIN ST R I C H M O N D , V T 05477	N/A	509(a)(1)	Support Economically Disadvantaged Students From the Northeast Kingdom	2,000
WONDER WISDOM INCPO BOX 300 G R E E N S B O R O , V T 05841	N/A	509(a)(1)	General Unrestricted	40,000
<b>Total . . . . .</b>  <b>3a</b>				111,875