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Form 990-PF

## **Return of Private Foundation**

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

Department of the Treasury
Internal Revenue Service No

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

OMB No 1545-0052

2011

24 Total operating and administrative expenses. Add lines 13 through 23 25 Contributions, gifts, grants paid  19,904 12,547 0 5,121 49,000 49,000		For	cale	ndar year 2011 or tax year beginning	10/1/	/2011 , an	nd ending	9/	30/2012		
Number and street (or P D Dea number (mail and rest)   Room/suide   B Telephone (2888) 79.04-933 (2893) (2903) (	, w.,	Nan	ne of f	oundation				A E	mployer identification nu	mber	
Number and streak (or P.D. Dos number (mail is not delivered to streat address)   Room/sulfs   B Telephone (mails   G) 200-4933 (mail   G) 200-4	٢٠٠٠	RUI	гн а	NDERSON WHEELER & HENRY O WHEELER	CHAF	RITABLE 18-423	800	İ	91-62536	678	
Philadelphia   PA   19108-2112	}	Nun	nber a	and street (or P O box number if mail is not delivered to street a	ddress	)		ВТ	elephone number (see insti	ructions)	
Philadelphia	ù,	Wel	ls Fa	argo Bank N.A 101N Independence Mall E MAC	Y137	72-062			(888) 730-	4933	
Philadelphia								C If	exemption application is pe	nding, check here	• ▶ 🗍
G Check all that apply:	당.	Phil	adeli	nhia	PA		19106-2112			-	
Final return   Amended return   Amended return   Address change   Name								D 1.	Foreign organizations, che	ck here	►□
H Check type of organization			0,,,00			-	•	l			
H Check type of organization  Section 501(c)(3) exempt private foundation  Section 4947(a)(1) nonexempt charitable frust	2										່ ▶□
Section 4947(a)(1) nonexempt charitable trust	<b>.</b>	ш,	Char				n	ł			
Fair market value of all assets at and   Jacounting method:   Cash   Accrual   of year (from Part II), col. (c),   Col.		$\overline{}$									▶□
or year ((Nort) = 1741 (), Cu. (Cu.) Inter 15 () ≥ \$ 1,086,692 ((Part I, column (d) must be on cash basis.)    Continuous modume (a) (see instructions)   (a) (a) equipment on accessary) equal the amounts modume (a) (see instructions)		<u>Ц</u>						Į.			٠ ـــا
Analysis of Revenue and Expenses (The total of must be on cash basis)   Analysis of Revenue and Expenses (The total of must be on cash basis)   (c) Adjusted not income must in column (a) (see instructions)   (d) Revenue and expenses per books   (e) Adjusted not income must in column (a) (see instructions)   (e) Adjusted not income must in column (a) (see instructions)   (e) Adjusted not income must income income must income income must income income must income income income must income income income must income income income must income	ಕ್ಷ	l l					Accruai	I -			▶□
Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (e) (see instructions)  1 Contributions, girls, grants, etc., received (attach schedule) 2 Check   \( \bar{\text{\text{CM}}}\) (the foundation is not equivalent attach Sch B 3 interest on savings and temporary cash investments 4 Dividends and interest from securities 5 a Gross rents 5 a Gross rents 6 b Net rental income or (loss) 7 b Net rental income or (loss) 8 Net short-term capital gain in entire (c) Adjusted net income from the income income from the income incom							s )	"			٠ ــــ
### smounts in columns (b). (c), and (d) may not necessarily equal the amounts in column (a) (see instructions)  1							<u> </u>			(d) Disburser	nents
the amounts in column (a) (see instructions)  1 Contributions, gifts, grants, etc., received (attach schedule) 2 Check ▶ ★ The foundation is not required to attach Sch B 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 a Gross rents 5 b Net rental income or (loss) 6 b Net grant income or (loss) 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10 a Gross sales sers ruturns and allowances 10 b Less Cost of goods sold 10 c Gross sales to of forest, directors, trustees, etc 11 Compensation of officers, directors, trustees, etc 12 Total. Add lines 1 through 11 10 Compensation of officers, directors, trustees, etc 11 Compensation of officers, directors, trustees, etc 12 Total. Add lines 1 through 11 10 Depreciation (statch schedule) 10 Depreciation (statch schedule) 11 Cottler professional fees (attach schedule) 12 Total. Foreign plans, employee benefits 13 Depreciation (attach schedule) 14 Cottler professional fees (attach schedule) 15 Depreciation (attach schedule) 16 Depreciation (attach schedule) 17 Depreciation (attach schedule) 18 Taxes (attach schedule) 19 Depreciation (attach schedule) 20 Cocupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses (attach schedule) 24 Total operating and administrative expenses. 25 Add lines 13 through 23 26 Contributions, gifts, grants paid 27 Subtract line 26 from line 12 28 Excess of revenue over expenses and disbursements b Net investment income (friegative, enter-0-) 20 Departs of the forest income (friegative, enter-0-) 20 Departs of the forest income (friegative, enter-0-) 20 Departs of the forest income (friegative, enter-0-) 21 Expense of the forest income (friegative, enter-0-) 22 Excess of revenue over expenses and disbursements b Net investment income (friegative, enter-0-) 20 Departs of the forest income (friegative, enter-0-) 20 Departs of the forest income (friegative, enter-0-) 20 Departs of the forest income (friegative, enter		ı aı				· .	• •	ent	1 7 7		
1					1		income		ıncome		
2 Check			4	Contributions gifts grants etc. received (attach schedule)	+		7		* * * * * * * * * * * * * * * * * * * *	(00011 20010 1	Jy,
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4 Dividends and interest from securities 5 a Gross rents 5 a Gross rents 6 a Net gain or (loss) from sale of assets not on line 10 b Gross sales proce for all assets on time 6a 64,109 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10 a Gross sales less returns and allowances 10 b Less Cost of goods sold 11 Other income (attach schedule) 12 Total. Add lines 1 through 11 23,848 33,156 0 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 33,156 34,121 34,122 34,123 34,124 34,124 34,125			_	_			27.23	0	* * *	* 1	, ,,
5 a Gross rents b Net rental income or (loss) 0			-			33.156	3:	3.156		);	· ·
b Net rental income or (loss) from sale of assets not on line 10 6 a Net gain or (loss) from sale of assets not on line 10 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 10 a Gross sales not on line 6a 64,109 9 Income modifications 10 a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) (attach schedule) 11 Other income (attach schedule) 12 Total. Add lines 1 through 11 23,848 33,156 0 14 Other employee salanes and wages 15 Pension plans, employee benefits 16 Legal fees (attach schedule) 17 Cother professional fees (attach schedule) 18 Taxes (attach schedule) 19 Depreciation (attach schedule) 10 Other professional fees (attach schedule) 11 Interest 12 Travel, conferences, and meetings 15 Pension and publications 16 Total expenses and disbursements. Add lines 24 and 25 17 Total expenses and disbursements. Add lines 24 and 25 18 Total expenses and disbursements b Net investment income (if negative, enter -0-)			-					0			
6 a Net gain or (loss) from sale of assets not on line 10				_	$\vdash$	<u> </u>	<b>5</b> .4		KECEIV	ED	} ~ <u>.</u>
8 Net short-term capital gain 9 Income modifications 10 a Gross sales less returns and allowances b Less Cost of goods sold c Gross sprofit or (loss) (attach schedule)  11 Other income (attach schedule)  12 Total. Add lines 1 through 11 23,848 33,156 0 3,969 45 Pension plans, employee benefits C Other employee salanes and wages 45 Pension plans, employee benefits C Other professional fees (attach schedule) C Other professional fees (attach schedule)  17 Interest 18 Taxes (attach schedule) and depletion C Occupancy 17 Interest 18 Taxes (attach schedule) and depletion 18 Taxes (attach schedule) and depletion 19 Depreciation (attach schedule) and depletion 19 Depreciation (attach schedule) and depletion 19 Depreciation (attach schedule) and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Other expenses (attach schedule) 37 12 0 25 37 25 Contributions, grifs, grants paid 38 25 Contributions, grifs, grants paid 39 12 0 54,121 27 Subtract line 26 from line 12 28 Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)		3		` ' <u> </u>	1	-9,308	Julian (S		6	<del>***</del> O	18
8 Net short-term capital gain 9 Income modifications 10 a Gross sales less returns and allowances b Less Cost of goods sold c Gross sprofit or (loss) (attach schedule)  11 Other income (attach schedule)  12 Total. Add lines 1 through 11 23,848 33,156 0 3,969 45 Pension plans, employee benefits C Other employee salanes and wages 45 Pension plans, employee benefits C Other professional fees (attach schedule) C Other professional fees (attach schedule)  17 Interest 18 Taxes (attach schedule) and depletion C Occupancy 17 Interest 18 Taxes (attach schedule) and depletion 18 Taxes (attach schedule) and depletion 19 Depreciation (attach schedule) and depletion 19 Depreciation (attach schedule) and depletion 19 Depreciation (attach schedule) and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Other expenses (attach schedule) 37 12 0 25 37 25 Contributions, grifs, grants paid 38 25 Contributions, grifs, grants paid 39 12 0 54,121 27 Subtract line 26 from line 12 28 Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)		Je.			3	\$6.58	`:		JAN 29 20	12  2	414.5
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b Less Cost of goods sold c Gross profit or (loss) (attach schedule) 11 Other income (attach schedule) 12 Total. Add lines 1 through 11 23,848 33,156 0 3,969 45 Other employee salanes and wages 45 Pension plans, employee benefits 87 Total ese (attach schedule) 1 Accounting fees (attach schedule) 1 Depreciation (attach schedule) 1 Interest 1 Taxes (attach schedule) (see instructions) 1 Total expenses and meetings 2 Other expenses (attach schedule) 2 Occupancy 2 Total expenses (attach schedule) 3 Other expenses (attach schedule) 3 Other expenses (attach schedule) 4 Total operating and administrative expenses. Add lines 13 through 23 4 Subtract line 26 from line 12 4 Excess of rovenue over expenses and disbursements b Net investment income (if negative, enter -0-)  1 Other professional fees (attach schedule) 2 Other professional fees (attach schedule) 3 Other expenses and disbursements b Net investment income (if negative, enter -0-)			9	Income modifications				<u>, L</u>	OGUEN,	UT	73 Y
c Gross profit or (loss) (attach schedule)  1 Other income (attach schedule)  1 Total. Add lines 1 through 11  2 Total. Add lines 1 through 12  2 Total operating and administrative expenses.  Add lines 13 through 23  2 Total operating and administrative expenses.  Add lines 13 through 23  2 Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  2 Dotal. Add lines 1 through 11  2 Total operating and disbursements b Net investment income (if negative, enter -0-)			10 a	Gross sales less returns and allowances	)	4 98	<u> </u>	* \$	7		
11 Other income (attach schedule) 12 Total. Add lines 1 through 11 23,848 33,156 0 3 Compensation of officers, directors, trustees, etc Other employee salanes and wages Other professional fees (attach schedule) Other professional fees (attach			Ł	Less Cost of goods sold	9	4 "			177		
Total. Add lines 1 through 11  23,848  33,156  0  3,969  14 Other employee salanes and wages  45 Pension plans, employee benefits  6 a Legal fees (attach schedule)  5 Accounting fees (attach schedule)  6 Total expenses and meetings  7 Total operating and administrative expenses.  Add lines 13 through 23  25 Contributions, gifts, grants paid  7 Total expenses and disbursements  8 Destroyer of revenue over expenses and disbursements  8 Destroyer of the more of				Gross profit or (loss) (attach schedule)	<u> </u>		· • • • • • • • • • • • • • • • • • • •				
10   10   10   10   10   10   10   10				•	-						
Other employee salanes and wages Pension plans, employee benefits 16 a Legal fees (attach schedule) 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0			$\sim$								
Pension plans, employee benefits  16 a Legal fees (attach schedule)  10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		ရွ			<u> </u>	15,877	1	1,908			3,969
16 a Legal fees (attach schedule)				• •					·		
b Accounting fees (attach schedule)  1,127  0 0 0 1,127  1 o 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0					<b>—</b>						
c Other professional fees (attach schedule)  17 Interest  18 Taxes (attach schedule) (see instructions)  19 Depreciation (attach schedule) and depletion  20 Occupancy  21 Travel, conferences, and meetings  22 Printing and publications  23 Other expenses (attach schedule)  24 Total operating and administrative expenses.  Add lines 13 through 23  25 Contributions, gifts, grants paid  26 Total expenses and disbursements. Add lines 24 and 25  27 Subtract line 26 from line 12  a Excess of revenue over expenses and disbursements  b Net investment income (if negative, enter -0-)		- 1111			$\vdash$						
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		9	ַ ב	, , , , , , , , , , , , , , , , , , ,							
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		댩	<u>'</u> (								
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		類			-	2 863		627	0		0
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		Ę.	10	· · · · · · · · · · · · · · · · · · ·							
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		Ε	-20 -13	• • • • • • • • • • • • • • • • • • • •							
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		¥	₃20 :21	• •	-						
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		ģ	22								
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		8	23			37		12	0		25
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		ing	24								
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		rat			L	19,904	1	2 <u>,54</u> 7			5,121
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		e E	25								49,000
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 20,609		0	26			68,904	1	2,547	0		54,121
a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)  20,609				Subtract line 26 from line 12			Å		1	3.6	
b Net investment income (if negative, enter -0-)						-45,056		> ×		<i>₹</i> <b>%</b> •	
c Adjusted net income (if negative, enter -0-)							2	0,609	₹.¥		
				c Adjusted net income (if negative, enter -0-)					0		

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2011)

Form	990-PI	F (2011) RUTH ANDERSON WHEELER & HENRY O WHEELER	CHARITABLE 18-42	3800 91-6	3253678 Page <b>2</b>
	4 11	End o	of year		
Ра	rt II	Balance Sheets should be for end-of-year amounts only. (See instructions.)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	. 1	Cash—non-interest-bearing .	0	0	
	2	Savings and temporary cash investments	36,267	33,611	33,611
	3	Accounts receivable   0	*		
	_	Less allowance for doubtful accounts	0	0	0
	4	Pledges receivable ▶ 0			
		Less allowance for doubtful accounts	o	0	0
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see instructions)	ol	o	0
	7	Other notes and loans receivable (attach schedule)	\$.	<u> </u>	
	•	Less allowance for doubtful accounts	0	0	0
	8	Inventories for sale or use	0	0	
Assets	9	Prepaid expenses and deferred charges		0	
SS		• •	0	0	0
⋖		Investments—U.S. and state government obligations (attach schedule)	0	0	0
		o Investments—corporate stock (attach schedule)	0	0	0
		Investments—corporate bonds (attach schedule)		<u> </u>	* 1
	11			<u></u>	0
	40	Less accumulated depresentation (attach defined to )			
	12	Investments—mortgage loans	940,040	897,990	1.052.091
	13	Investments—other (attach schedule)	940,040		1,053,081
	14			0	
		Less accumulated depreciation (attach series ate)	0		0
	15	Other assets (describe )	١		0
	16	Total assets (to be completed by all filers—see the	976,307	931,601	1 096 602
	4-	instructions. Also, see page 1, item I)	970,307	01,001	1,086,692
	17	Accounts payable and accrued expenses		U	
es.	18	Grants payable	0		
Liabilities	19	Deferred revenue	0		
ق	20	Loans from officers, directors, trustees, and other disqualified persons	0		
Ë	21	Mortgages and other notes payable (attach schedule)	0	. 0	
	22	Other liabilities (describe  Tatel liabilities (add lines 17 through 22)	0	0	
	23	Total liabilities (add lines 17 through 22)	<u> </u>		; ; ; }
S		Foundations that follow SFAS 117, check here			
Ş		and complete lines 24 through 26 and lines 30 and 31.			
alances	24	Unrestricted			
	25	•			
9	26	Permanently restricted			
=		Foundations that do not follow SFAS 117, check here			
Ē		and complete lines 27 through 31.	070 207	024 604	
Net Assets or Fund B	27	Capital stock, trust principal, or current funds	976,307	931,601	
ë	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
155	29	Retained earnings, accumulated income, endowment, or other funds	076 207	034 604	
Ť.	30	Total net assets or fund balances (see instructions)	976,307	931,601	
Š	31	Total liabilities and net assets/fund balances (see	070.007	004 004	
		instructions)	976,307	931,601	<u> </u>
	rt III	Analysis of Changes in Net Assets or Fund Balances	20 (must acres with		<u> </u>
1		net assets or fund balances at beginning of year—Part II, column (a), line	: 50 (must agree with	4	076 207
_		of-year figure reported on prior year's return)		1 2	976,307
_		r amount from Part I, line 27a	m#	3	-45,056 5,036
3		r increases not included in line 2 (itemize) See Attached Stateme	#IIL	. 4	5,026
_		ines 1, 2, and 3		. 4	936,277
5		eases not included in line 2 (itemize) See Attached Statement	volume (b) line 20	6	4,676
0	ıotal	net assets or fund balances at end of year (line 4 minus line 5)-Part II, o	∽ימוווו (ט), ווווב טט	ן ט	931,601

Form 990-PF (2011) RUTH AND	<b>ERSON WHEELER &amp; HENI</b>	RY O WHEELI	<u>ER CHARITABLE</u>	18-423800	91-625367	8 Page <b>3</b>
Part IV Capital Gains and	Losses for Tax on Inve	stment Inco				
	und(s) of property sold (e g , real est , or common stock, 200 shs MLC C		(b) How acquired P—Purchase D—Donation	(c) Date ac (mo , day		Date sold , day, yr )
1a See Attached Statement						
b						
С						
d						
e			L			
(e) Gross sales price	(f) Depreciation allowed (or allowable)		or other basis ense of sale		(h) Gain or (loss) (e) plus (f) minus (g)	)
<b>a</b> 0	0		0			0
<b>b</b> 0	0	·	0			0
<u>c</u> 0	0		0			0
_d0	0		0			0
<u>e</u> 0	0		0			0
Complete only for assets shown (i) F M V as of 12/31/69	(j) Adjusted basis	(k) Exce	ess of col (i)	col (l	Gains (Col (h) gain m k), but not less than -	-0-) <b>or</b>
	as of 12/31/69	over co	ol (j), if any		Losses (from col (h)	<del>`                                    </del>
<b>a</b> 0	0		0			0
<del></del>			0	·		0
d 0			0			- 0
e 0			0			
2 Capital gain net income or (r		lso enter in Pa	art I, line 7	2	<del></del>	
3 Net short-term capital gain o if gain, also enter in Part I, lii	, (loss) as defined in section r (loss) as defined in section		(6):	2		-9,308
to Double love O			, , , , , , , , , , , , , , , , , , ,	3		0
Part V Qualification Under	r Section 4940(e) for Re	duced Tax o	on Net Investme	ent Incom	e	
If section 4940(d)(2) applies, lea Was the foundation liable for the If "Yes," the foundation does not	section 4942 tax on the dist	e). Do not com	plete this part			X No
	<u>int in each column for each y</u>	ear; see the ir	nstructions before	making any		
(a) Base period years Calendar year (or tax year beginning in	(b) Adjusted qualifying distributio	ns Net value	(c) of nonchantable-use a	ssets	(d) Distribution rat (col (b) divided by o	
2010		1,913	1,108	3,073	<u> </u>	0.046850
2009		3,248	1,041			0.046323
2008		1,216		5,283		0.063352
2007		1,951	1,270	),329		0.048768
2006	66	6,645	1,354	,549		0.049201
2 Total of line 1, column (d)				. 2		0.254494
3 Average distribution ratio for the number of years the four				. <u>3</u>		0 050899
4 Enter the net value of nonch	aritable-use assets for 2011	from Part X, li	ne 5	. 4	ļ	1,061,727
5 Multiply line 4 by line 3				. 5		54,041
6 Enter 1% of net investment i	ncome (1% of Part I, line 27	b)		6	<del> </del>	206
7 Add lines 5 and 6 .				. 7	<del> </del>	54,247
8 Enter qualifying distributions If line 8 is equal to or greater the Part VI instructions.		 n Part VI, line 1	 1b, and complete	8 that part usi	ing a 1% tax rate	54,121 e See

Form	990-PF (2011) RUTH ANDERSON WHEELER & HENRY O WHEELER CHARITABLE 18-423800 91-625	3678	Pa	age 4
Pai	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instruc	tions	ş)	
	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)  Domestic foundations that meet the section 4940(e) requirements in Part V, check		412	
С	here and enter 1% of Part I, line 27b  All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4%	(		
2	of Part I, line 12, col (b)  Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		0	
2 3	Add lines 1 and 2		412	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		412	
6	Credits/Payments Credits/Payments			, , ,
а	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 1,410			
	Exempt foreign organizations—tax withheld at source	9		
	Tax paid with application for extension of time to file (Form 8868)  6c  0			
_	Backup withholding erroneously withheld  6d  6d	4	440	لديا
7 8	Total credits and payments Add lines 6a through 6d  Enter any penalty for underpayment of estimated tax Check here	1	,410 0	<del></del>
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed .		0	
10	Overpayment, If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		998	
11	Enter the amount of line 10 to be Credited to 2012 estimated tax   412 Refunded   11		586	-
Pai	t VII-A Statements Regarding Activities		000	
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	- Q. ( )	Yes	No
	participate or intervene in any political campaign?	1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the			
	instructions for definition)?	1b		Х
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials			\$3,4,3
	published or distributed by the foundation in connection with the activities	K.	3.0	
	Did the foundation file Form 1120-POL for this year?	1c		_X_
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year		<b>8</b> 4	
_	(1) On the foundation > \$ (2) On foundation managers > \$			1
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed			
2	on foundation managers.   \$	2	-	X
-	If "Yes," attach a detailed description of the activities	*		7
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles			
	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
<b>4</b> a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b	olf "Yes," has it filed a tax return on Form 990-T for this year?		N/A	ļ
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	84 A 888°.	X
e	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  By language in the governing instrument, or			. 23
	By state legislation that effectively amends the governing instrument so that no mandatory directions			
	that conflict with the state law remain in the governing instrument?	6	Х	الستكفة
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	Х	
<b>8</b> a	Enter the states to which the foundation reports or with which it is registered (see instructions)		9 ;	
	WA			
t	olf 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	Х	p. 10014
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3)	313		للكلان
	or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes,"			
40	complete Part XIV  Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing	9		<u> </u>
10	their names and addresses	10		X
	are removed and dedication	10		<u> </u>

rom	990-PF (2011) RUTH ANDERSON WHEELER & HENRY O WHEELER CHARITABLE 18-423800 91-625	30/0		age 3
Par	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		Х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had			
	advisory privileges? If "Yes," attach statement (see instructions)	12		<u> </u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Χ.	L
	Website address ► N/A			
14	The books are in care of ► WELLS FARGO BANK N A  Telephone no ► 888-730-49			
45	Located at ► 101N Indepndence Mall E MACY1372-062 Philadelphia PA ZIP+4 ► 19106-2112			
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  I 15 N/A			۰ ட
16	and enter the amount of tax-exempt interest received or accrued during the year  At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority		Yes	No
16	over a bank, secunties, or other financial account in a foreign country?	16	163	X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of	13	3 (1)	
	the foreign country			
Pa	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required	<del></del>	<u></u>	
	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	1 (3)	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? . Yes X No	*		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?		and any section	
	(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"	1		
	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		7.	
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here		) Š	,
С	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	``	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))	\$ C		
а	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d	ا بر	Fil	
	and 6e, Part XIII) for tax year(s) beginning before 2011?	'.	2.5	
	If "Yes," list the years 20 , 20 , 20 , 20 , 20	100		
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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)	1	NI/A	
_	to all years listed, answer "No" and attach statement—see instructions )	2b	N/A	190 SI .
С	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here			
3a	▶ 20, 20, 20 Did the foundation hold more than a 2% direct or indirect interest in any business			ă,
va	enterprise at any time during the year?  Yes X No		1,11	
b	If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation		3	
	or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved			rá rá
	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 penod? (Use Schedule C, Form 4720, to determine	` "		13.8
	if the foundation had excess business holdings in 2011)	3b	N/A	
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	>>	Ž.	
	purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		Х

	RUTH ANDERSON WHEELE							91-	6253678	Page 0
	rt VII-B Statements Regarding Activiti			1 47	20 May Be R	equire	d (continued)		Louistater on Ta	cureren Immerce
5a	During the year did the foundation pay or incur any			_			П.,	г <del></del> .		
	(1) Carry on propaganda, or otherwise attempt t						Yes	X	lo 🗼	
	(2) Influence the outcome of any specific public			<del>3</del> 55),	or to carry		С.	<u></u>	1/24	
	on, directly or indirectly, any voter registration	n anv	e?				∐ Yes	M	lo 📑	3. 1.3
	(3) Provide a grant to an individual for travel, stu	idy, o	r other simılar pur	pose	s?		Yes	X N	lo i	
	(4) Provide a grant to an organization other than		_		tion described				25	
	in section 509(a)(1), (2), or (3), or section 49		• • •				Yes	X N	lo 🙀	鐵門
	(5) Provide for any purpose other than religious, educational purposes, or for the prevention of	of crue	elty to children or	anim	als?		Yes	XN	ю .	
b	If any answer is "Yes" to 5a(1)–(5), did any of the t						ribed in		22.2	75
	Regulations section 53 4945 or in a current notice	_	-			ns)?	_	_	5b	N/A
	Organizations relying on a current notice regarding						•	Ш	24.2	
С	If the answer is "Yes" to question 5a(4), does the f		•	tion 1	rom the N/A		□ v <sub>aa</sub>			<b>11.</b>
	tax because it maintained expenditure responsibilif "Yes," attach the statement required by Regulation	-	_	(d)	IN/A		Yes	Ш"	lo	
62	Did the foundation, during the year, receive any full				nav				and and	
ya	premiums on a personal benefit contract?	iua, (	andony or moneou	٠, ١٠	,		Yes	XN		
b	Did the foundation, during the year, pay premiums	, dire	ctly or indirectly. a	nan	ersonal benefit d	ontract?		۱۰ ت	6b	X
	If "Yes" to 6b, file Form 8870		•				_	XN		
	At any time during the tax year, was the foundation if "Yes," did the foundation receive any proceeds of						Yes	<u>~</u>		N/A
_								Daid I		
, P	art VIII Information About Officers, and Contractors	Dir	ectors, rruste	.es,	Foundation	wanay	ers, nighty	raiu	Employe	es,
	List all officers, directors, trustees, found	ation	managers and	l the	ir compensati	on (see	instructions	,		
<u></u>	List all dillocis, anothers, a detects, realitation		Title, and average		Compensation		Contributions to	<del>"</del>	(e) Expense	a account
	(a) Name and address		hours per week evoted to position	(If	not paid, enter -0-)		oyee benefit plans ferred compensati		other allo	
We	lls Fargo Bank, N A	Trus				2.1.5 40	ionea componida	<del>"</del>		
	N Independence Mall E MACY1372-062 Phi		4.00		15,877			0		0
			00		0			0		0
			00		0			-		0
			00		ر			ار		^
<del>_</del>	Composition of five highest poid ample				naludad an lis	- 4		- U		0
2	Compensation of five highest-paid employenter "NONE."	yees	(otner than the	ose i	nciuaea on iir	ie 1—s	ee instruction	15 <i>)</i> . IT	none,	
			(b) Title, and avera			ı	(d) Contributions t employee benefit		(a) Evpens	account
(a	Name and address of each employee paid more than \$50	,000	hours per week		(c) Compensation	חיי	plans and deferred		(e) Expense other allo	
<del></del>			devoted to position	<i>"</i>			compensation	-		
NO	NE	· <b></b> ·		- 1						
				$\dashv$				+		
		··		-		- }		-		
				$\dashv$		$\dashv$		$\dashv$	<del></del>	
				]						
				寸	<del></del>		·			
				]		_				
				$\Box$						
				1		_				
_										
10	al number of other employees paid over \$50,0	000						<b>•</b>		0

Form 990-PF (2011) RUTH ANDERSON WHEELER & HENRY O WHEEL		91-6253678 Page 1
Part VIII Information About Officers, Directors, Trustees and Contractors (continued)		d Employees,
3 Five highest-paid independent contractors for professional services (se	ee instructions). If none, enter "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
NONE		0
		0
		<u> </u>
		_
		0
		0
		0
Total number of others receiving over \$50,000 for professional services	<u> </u>	<u> </u>
Part IX-A Summary of Direct Charitable Activities		
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include releva	int statistical information such as	Expenses
the number of organizations and other beneficiaries served, conferences convened, research	ı papers produced, etc	Expenses
1 NONE		
•••••		
2		
2		
2	<del></del>	
3		
·		<u> </u>
4		
		<u> </u>
Part IX-B Summary of Program-Related Investments (see		T
Describe the two largest program-related investments made by the foundation during the tax	year on lines 1 and 2	Amount
1 NONE		
2		
	,	
All other program related investments. See instructions		
All other program-related investments. See instructions		
3 NONE		
•		_
		0
Total. Add lines 1 through 3	<u> </u>	0
		Form <b>990-PF</b> (2011)

Form	990-PF (2011) RUTH ANDERSON WHEELER & HENRY O WHEELER CHARITABLE 18-423800		6253678 Page 8
Pai	Minimum Investment Return (All domestic foundations must complete this part. Foreign	found	lations,
	see instructions.)		
1	Fair market value of assets not used (or held for use) directly in carrying out chantable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	1,018,062
b	Average of monthly cash balances .	1b	59,833
С	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	1,077,895
е	Reduction claimed for blockage or other factors reported on lines 1a and	, 3	
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,077,895
4	Cash deemed held for charitable activities Enter 1 ½ % of line 3 (for greater amount, see		
	instructions)	4	<u>16,</u> 168
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,061,727
6	Minimum investment return. Enter 5% of line 5	6	53,086
Par	TXI 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	53,086
2a	Tax on investment income for 2011 from Part VI, line 5	1 5 M S M	
b	Income tax for 2011 (This does not include the tax from Part VI)	#	
C	Add lines 2a and 2b	2c	412
3	Distributable amount before adjustments Subtract line 2c from line 1 .	3	52,674
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	52,674
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,	_	50.074
	line 1	7	<u>52,674</u>
Par	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	12	
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	54,121
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 chantable, etc,		
	purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the	Äù	
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	54,121
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 instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	54,121
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foun qualifies for the section 4940(e) reduction of tax in those years	dation	

Form 9	90-PF (2011) RUTH ANDERSON WHEELER & H	ENRY O WHEELE	R CHARITABLE 18	-423800 91-6	253678	Page 9
Part	XIII Undistributed Income (see instructions	)				
		(a)	(b)	(c)	(d	
1	Distributable amount for 2011 from Part XI,	Corpus	Years pnor to 2010	2010	201	
	line 7					52,674
2	Undistributed income, if any, as of the end of 2011			40.000		
а	Enter amount for 2010 only		(A )	48,986	Y 31 3	<u> </u>
b	Total for prior years 20, 20, 20		0		4 - 4 - 4 - 4	
3	Excess distributions carryover, if any, to 2011					7311
а	From 2006 0				4 2 7 3 4	
Ь	From 2007 0					
C	From 2008 0					
d	From 2009 0					
e	From 2010					
f f	Total of lines 3a through e	. 42.40 March 2000				100
4	Qualifying distributions for 2011 from Part XII. line 4  \$ 54,121					
•	XII, line 4  \$ 54,121 Applied to 2010, but not more than line 2a			48,986		
	Applied to undistributed income of prior years			310000		100
J	(Election required—see instructions)		1 0			
С	Treated as distributions out of corpus (Election			2 1 2 2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	· 75	
_	required—see instructions)	0				3.
d	Applied to 2011 distributable amount .					5,135
е	Remaining amount distributed out of corpus	0	Ź,	*****		
5	Excess distributions carryover applied to 2011	0				C
	(If an amount appears in column (d), the		7.8	-344		id.
	same amount must be shown in column (a) )		4			44
6	Enter the net total of each column as			# 2 mg		
	indicated below:					
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	<u> </u>		22,043,2		
D	Prior years' undistributed income Subtract line 4b from line 2b		1 0		1,000	
_	Enter the amount of prior years' undistributed	g 1832	<u> </u>	77 17.65	1	
С	income for which a notice of deficiency has					
	been issued, or on which the section 4942(a)					
	tax has been previously assessed		*			, , (
d		4			h_ ,[k](	
-	amount—see instructions		0			
е	Undistributed income for 2010 Subtract line					
	4a from line 2a Taxable amount—see					5
	instructions		1	. 0		
f	Undistributed income for 2011 Subtract					
	lines 4d and 5 from line 1 This amount must	* V				
	be distributed in 2012	44-76			1 1 3 3 4 4 5 7 7	47,539
7	Amounts treated as distributions out of					
	corpus to satisfy requirements imposed by					
_	section 170(b)(1)(F) or 4942(g)(3) (see instructions)					NAC AND
8	Excess distributions carryover from 2006	، ا				
9	not applied on line 5 or line 7 (see instructions)  Excess distributions carryover to 2012.	<u>-</u>				
3	Subtract lines 7 and 8 from line 6a					
10	Analysis of line 9				12.2.	- 1
iu a						
b					24	
c						
d						Č.
	Excess from 2011	5				

_	n 990-PF (2011) RUTH ANDERSON WHEEL					
	rt XIV Private Operating Foundations (s			uestion 9)		N/A
1 a	If the foundation has received a ruling or determina					
_	foundation, and the ruling is effective for 2011, ent		•			
	Check box to indicate whether the foundation is a Enter the lesser of the adjusted net	private operating four	ndation described in	section	4942(J)(3) or	4942(j)(5)
2 2	income from Part I or the minimum	Tax year	<sub>-</sub> -	Prior 3 years		(e) Total
	investment return from Part X for each	(a) 2011	(b) 2010	(c) 2009	(d) 2008	
	year listed	0				0
	85% of line 2a	0	0	0	0	0
•	Qualifying distributions from Part XII, line 4 for each year listed					0
	Amounts included in line 2c not used directly	0				
•	for active conduct of exempt activities .					0
•	Qualifying distributions made directly					<u>_</u>
	for active conduct of exempt activities					
•	Subtract line 2d from line 2c	0	0	0	0	0
3	Complete 3a, b, or c for the alternative test relied upon					
á	"Assets" alternative test—enter					
	(1) Value of all assets					0
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
ı	"Endowment" alternative test—enter 2/3 of minimum investment return shown in			_		
	Part X, line 6 for each year listed	o				0
•	"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	<b></b>		<del></del>		0
	and 5 or more exempt					
	organizations as provided in section 4942(j)(3)(B)(iii)					0
	(3) Largest amount of support					<u>_</u>
	from an exempt organization					0
	(4) Gross investment income					0
P	art XV Supplementary Information (Co			ndation had \$5,	000 or more in	
_	assets at any time during the ye		tions.)	· ·		
1	Information Regarding Foundation Manag		0/ -645 - t-t-lt-	L. 4::	4b a 6a d-4ba-	
,	List any managers of the foundation who have con before the close of any tax year (but only if they have	ntributed more than 2 ave contributed more	% of the total contri than \$5,000) (See	section 507(d)(2)	the roundation	
NC	DNE		40,000, (000			
	List any managers of the foundation who own 10%	6 or more of the stock	of a corporation (o	r an equally large p	ortion of the	
	ownership of a partnership or other entity) of which	h the foundation has	a 10% or greater in	terest		
	DNE				<u></u>	
2	Information Regarding Contribution, Gran		• •	_		
	Check here  if the foundation only makes unsolicited requests for funds if the foundation makes					
	other conditions, complete items 2a, b, c, and d	akes gints, graints, etc	(See instruction)	to marriadale or orgi		
_	The name, address, and telephone number of the	person to whom app	lications should be	addressed		
_		o= 400 4 =	N /= T. 00:11		0.0705	
	JTH & HENRY WHEELER CHARITABLE TRU  The form in which applications should be submitted.				2-3705	
	The long in which applications should be submitted	and information an	u materiais tiley Shi	July Highlige		
ΑF	PLICATIONS SHOULD BE SUBMITTED IN W	/RITING _				
	Any submission deadlines					
<b>k</b> 14	DAIE					
	ONE Any restrictions or limitations on awards, such as	by geographical area	s, chaпtable fields.	kinds of institutions.	or other	<del></del>
	factors	, <u>, , , , , , , , , , , , , , , , , , </u>				
C	ONTRIBUTIONS WILL ONLY BE MADE TO CH	HARITABLE ORGA	NIZATIONS DEF	INED BY IRC SE	CTION 170(C)2	

Total

Part XV Supplementary Information (contin	ued)			
Grants and Contributions Paid During t		for Future P	ayment	
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year				
See Attached Statement		1		
		<b>1</b>		
		1		
		ł		
		l l		
		]	j	
		l		
		<u> </u>		
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		]		
		1		
		1		
		]		
		<u> </u>		
T-4-1	<u> </u>	<u> </u>	▶ 3a	49,000
Total	<u> </u>	<del>,                                    </del>	<u>.</u> . > 3a	49,000
NONE				
		[		
	1			
		1 1		

0

▶ 3b

Form 990-PF (2011) RUTH ANDERSON WHEELER & HE		ER CHARITAB	LE 18-423800	91-625	3678 Page <b>12</b>
Part XVI-A Analysis of Income-Producing Activ	/ities				
Enter gross amounts unless otherwise indicated.	Unrelated bus	iness income	Excluded by section	n 512, 513, or 514	(e)
1 Program service revenue	(a) Business code	<b>(b)</b> Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)
a		0		0	0
b		0		0	0
С		0		0	
d		0		0	
e		0		0	
f		0		0	0
g Fees and contracts from government agencies					_
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments				20.170	
4 Dividends and interest from securities			14	33,156	
5 Net rental income or (loss) from real estate	`		* *		
a Debt-financed property					
<b>b</b> Not debt-financed property					
6 Net rental income or (loss) from personal property		-		··· <u> </u>	
7 Other investment income		· -	- 10		
8 Gain or (loss) from sales of assets other than inventory		_	18	-9,308	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a		0		0	
b		0		0	
C		0		0	
d		0		0	-
e 12 Subtotal Add columns (b), (d), and (e)	36 <b>33</b> 6	0		23,848	
13 Total. Add line 12, columns (b), (d), and (e)	1700 W BAR 1			13	23,848
(See worksheet in line 13 instructions to venfy calculations )	•				20,010
Part XVI-B Relationship of Activities to the Acc	complishment	of Exempt P	urposes		
Line No. Explain below how each activity for which income				nportantly to	<del></del>
the accomplishment of the foundation's exempt p	ourposes (other tha	an by providing fu	nds for such purpe	oses) (See instru	ctions)
Not Applicable					<del></del>
Mot / philoabio					
				·	
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**Paid** 

Preparer

**Use Only** 

kn 1 Sulante SVP Wells Fargo Bank N.A.

Signature of officer or trustee

Firm's name

Print/Type preparer's name

JOSEPH J CASTRIANO

1/22/2013

Date

Preparer's signature

► PricewaterhouseCoopers, LLP

Firm's address ▶ 600 GRANT STREET, PITTSBURGH, PA 15219-2777

SVP Wells Fargo Bank N A

Date

1/22/2013

P01251603

13-4008324

412-355-6000

May the IRS discuss this return

with the preparer shown below (see

instructions)? X Yes No

Check X If

self-employed

Firm's EIN

Phone no

Security Category	Account #	Licon	Asset Ivalia	10017	17.0077
Invest - Corp Stock	18-423800		AFFILIATED MANAGERS GROUP, INC COM	1/835	11824 /5
Invest - Corp Stock	18-423800		E M C CORP MASS	14464	10840 12
nvest - Corp Stock	18-423800		EMERSON ELECTRIC CO	100000	1004012
nvest - Corp Stock	1842		GENERAL ELECTRIC CO	133814	4042 92 0222 6
Corp Stock	94.6	91-6253678 437076102		13366 45	11345 16
- Corp Stock	18-423800			12748 25	8852 71
- Corp Stock	8 6	91-62536/8 4/8160104	MONNEOUS & CONTROL OF THE CONTROL OF	16516.8	15085 71
- Corp Stock	16-423600		MICROSOFI CORP	12252	11506
- Corp Stock	10-423600		OBACI E CORPORATION	9438	8178
- Colp Stock	•		PROCEED S. DAMBI F.CO	10057.2	72889
Invest - Corp Stock	9 6		TEVA PHARMACEUTICAL INDUSTRIES - ADR	4141	5381
Corp Stock	4		UNION PACIFIC CORP	17211 5	11760 95
- Corp Stock	1847		WAL MART STORES INC	22140	16480 25
Invest - Corp Stock			EXXON MOBIL CORPORATION	20119	3368 75
Invest - Corp Stock	1842		TARGET CORP	19041	5335 69
nvest - Corp Stock	•		VERIZON COMMUNICATIONS	100254	9296 68
- Corp Stock	18-42	91-6253678 46625H100	JPMORGAN CHASE & CO	8905 6	103796
Invest - Corp Stock	_	91-6253678 G24140108	COOPER INDUSTRIES PLC NEW IRELAND	11259	7363 5
Invest - Corp Stock	18-4	91-6253678 166764100	CHEVRON CORP	16901 2	4997 79
Invest - Corp Stock	_	91-6253678 084670702	BERKSHIRE HATHAWAY INC	12789	12006
Invest - Corp Stock	_	91-6253678 20030N101	COMCAST CORP CLASS A	17872 5	9703 33
Invest - Corp Stock	•	91-6253678 92857W209	VODAFONE GROUP PLC NEW ADR	11229	10062 76
invest - Other	_		HARBOR INTERNATION FD INST #2011	51410 58	47500
Invest - Other	18-423800		MERGER FD SH BEN INT #260	25015 69	25000
- Other	18-423800		PIMCO FOREIGN BD FD USD H-INST #103	40099 1	39000
nvest - Other	18-423800		TAXABLE INTERMEDIATE TERM BD FD	99719 08	93841 23
- Other	18-423800	91-6253678 991283912	TAXABLE TOTAL RETURN BOND FUND	16176 73	15717 76
- Other	18-423800		ISHARES RUSSELL 2000	50481 2	39812 81
- Other	18-423800		ISHARES TR S & P MIDCAP 400 ID FD	72924.52	52633 58
Invest - Other	18-423800		DODGE & COX INT'L STOCK FD #1048	48411 67	47500
- Other	18-423800		ISHARES TR COHEN & STEERS REALTY	73355	21083 /8
nvest - Other	18-423800		DREYFUS EMG MKT DEBT LOC C-1 #6083	43327 35	41200
- Other	18-423800		HUSSIMAN STRATEGIC GROWTH FUND #601	528/43	61000
nvest - Other	18-423800		ISHARES TR MSCI EMERGING MARKETS	3/1925	75467
- Other	18-423800		WELLS FARGO ADV EMG MK E-INS #4146	39116 5	40000
nvest - Other	18-423800	91-6253678 722005667	PIMCO COMMODITY REAL RET STRAT-1#45	35458 38	20000
- Other	18-423800	91-6253678 74253Q580	PRINCIPAL INV R/E SEC-IS FUND 4934	18842 98	15000
- Other	18-423800	91-6253678 06738C778	IPATH DOW JONES-UBS COMMODITY INDEX	8842	05/9
- Other	18-423800	91-6253678 26852M105	EII INTERNATIONAL PROPERTY-I #30	14636 83	15000
- Other	18-423800	91-6253678 78463X863	SPDR DJ WILSHIRE INTERNATIONAL REAL	19428 75	16918 85
Other	18-423800	91-6253678 25264S833	DIAMOND HILL LONG-SHORT FD CL I #11	-	30000
			Total Invest - Other	1053080 94	897990 01
Savings & Temp Inv	v 18-423800	91-6253678 YY1001204	BLACKROCK INSTL FUNDS T-FUND #60	29302 48	29302 48
2. Temp In		400400400 OE00200 40			
		TO COMPANY A A COMPANY OF THE COMPAN		4308.91	4308 91

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RUTH ANDERSON WHEELER &	HENRY O WHEELER	CHARI	TABLE 10-4230	00 91-0250	0070 Page	1 01 2
Continuation of Part XV, L	ine 3a (990-PF) -	Gran	ts and Con	tributions Paid	<b>During th</b>	e Year
Recipient(s) paid during the year						
Name						
EPIPHANY LUTHERAN CHURCH						
Street					_	-
16450 JUANITA DRIVE NE						
City		State	Zıp Code	Foreign Country	v	
KENMORE		WA	98028	i orongin obunia.	,	
Relationship	Foundation Status		100020	I		
NONE	501(C)(3) PUBLIC (	CHARIT	Υ			
Purpose of grant/contribution					Amount	-
GENERAL SUPPORT GRANT						5,000
Name						
TACOMA ART MUSEUM Street	-					
1701 PACIFIC AVENUE						
City		State	Zip Code	Foreign Countr		
TACOMA		WA	98402	orcigir country	,	
Relationship	Foundation Status		100-102	L		
NONE	501 (C)(3) PUBLIC	CHARI	ΓY			
Purpose of grant/contribution	1001 (0)(0) 1 002.0	0.0.0	· · · · · · · · · · · · · · · · · · ·		Amount	<del></del>
GENERAL SUPPORT GRANT						7,500
						.,
Name						
THE ZOO SOCIETY						
Street						
5400 NORTH PEARL STREET	<del>-</del> .		7:- Codo	Tanaina Causta	<del></del>	
City TACOMA		State	Zip Code 98407	Foreign Country	у	
	Foundation Status	WA	196407			
Relationship NONE		CHVDI	τ∨			
Purpose of grant/contribution	[501 (C)(3) PUBLIC	CHARI	1 1		Amount	
GENERAL SUPPORT GRANT					Amount	3,500
GENERAL SOFFORT GRANT					<u> </u>	3,300
Name						
ANNIE WRIGHT SCHOOL						
Street						
827 N TACOMA		1	<del></del>			
City		State	1 '	Foreign Country	У	
TACOMA	JE	WA	98402			
Relationship	Foundation Status	0114 DI	D.			
NONE	501 (C)(3) PUBLIC	CHARI	1 Y		Amount	
Purpose of grant/contribution					Amount	12 000
GENERAL SUPPORT GRANT					<u> </u>	13,000
Name						
LAKESIDE SCHOOL						
Street						
14050 1ST AVENUE NORTHEAST						
City			Zip Code	Foreign Countr	у	
SEATTLE		WA	98125			
Relationship	Foundation Status					
NONE	501 (C)(3) PUBLIC	CHARI	TY		<del> </del>	
Purpose of grant/contribution					Amount	5 000
GENERAL SUPPORT GRANT					J	5,000
Name						
STANFORD UNIVERSITY						
Street						
450 SERRA MAILL				·		
City		State	Zıp Code	Foreign Countr	у	
STANDFORD		CA	94305			
Relationship	Foundation Status				- <del></del>	
NONE	501 (C)(3) PUBLIC	CHARI	TY			
Purpose of grant/contribution			<del></del>		Amount	
GENERAL SUPPORT GRANT		_			<u> </u>	5,000

RUTH ANDERSON WHEELER & H						2 of 2
Continuation of Part XV, Lin	<u>e 3a (990-PF) -</u>	Gran	ts and Contr	ibutions Paid	During t	<u>he Year</u>
Recipient(s) paid during the year						
Name WASHINGTON STATE HISTORICAL S	OCIETY			- <u></u>		
Street 1911 PACIFIC AVENUE						
City			Zip Code	Foreign Country	y	
TACOMA	In a dation Change	WA_	98402			
Relationship NONE	Foundation Status 501 (C)(3) PUBLIC	CHARIT	ΓΥ			
Purpose of grant/contribution GENERAL SUPPORT GRANT					Amount	5,000
Name UNIVERSITY OF WASHINGTON TACC	)MA					
Street						
1900 COMMERCE STREET		Ctata	Zip Code	Foreign Countr		
City TACOMA		State WA	98402	Foreign Country	у	
Relationship	Foundation Status				<del></del>	
NONE	501 (C)(3) PUBLIC	CHARI]	ΓΥ	<del>-</del>	I 4	
Purpose of grant/contribution GENERAL SUPPORT GRANT					Amount	5,000
Name						
Street		04-4-	T7:- 0 - 1	- In		
City	In and the Chatre	State	Zip Code	Foreign Country	y 	
Relationship	Foundation Status					
Purpose of grant/contribution					Amount	0
Name					_	
Street		-	<u></u> ,		· ····	····
City		State	Zip Code	Foreign Countr	y	
Relationship	Foundation Status					
Purpose of grant/contribution					Amount	0
Name			<del></del>			0
Street	<del></del>					
Cıty		State	Zip Code	Foreign Country	y	
Relationship	Foundation Status		<u> </u>			
Purpose of grant/contribution	<u> </u>				Amount	0
Name						
Street				<del></del>		
City		State	Zip Code	Foreign Countr	у	
Relationship	Foundation Status		<del></del>	· ·		
Purpose of grant/contribution					Amount	0

Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

		-9,308	0			jain	- 1	£	-79	-1,610	4,543	-7,662	-221	1,816	2,210	0	0
Net Gain	or Loss				:		or Loss										
Net	ō						Depreciation						ŀ				
Other	Expenses	73,417	0	Expense of Sale and	Cost of	Improve-	ments								:		
Cost, Other	Basis and Expenses				,	Valuation	Method										
Q	S	64,109	0			Cost or	Other Basis	000'9	4,000	31,000	7,560	18,545	6,312				
Gross	Sales		i			Gross Sales		6,019	3,921	29,390	3,017	10,883	6,091	1,816	2,210		
Totals		Securities	Other sales			_	Sold	7/12/2012	7/12/2012	7/12/2012	8/29/2012	5/11/2012	5/11/2012				
						Acquisition	Method										
						Date	Acquired	10/4/2011	5/20/2011	10/5/2010	6/23/2003	8/27/1999	10/5/2010				
				Check "X" If	Purchaser	īsa	Business										
							Purchaser										
	Amoint	762	3				CUSIP#	957663867	957663867	957663867	617446448	064058100	057224107				
		Tagothidatan Of mot cool	Short Town Co Distributions				Description	WESTERN ASSET NON-US OF	WESTERN ASSET NON-US OF	WESTERN ASSET NON-US OF	MORGAN STANI EY	BANK NEW YORK MELLON CO	RAKER HIGHES INC. COM	SUCCESSION OF CAIN	OND TERM CTE GAIN		
					Check "X"	if Sale of	Security	Ť					Ţ	T		1	
					Che	Ę.	. Š	1									

Line 16b (990-PF) - Accounting Fees

Net Investment Adjusted Net Income Income			1,127	0	0	1,127
Name of Organization or Expenses per Net Investment Adjusted Net Person Providing Service Books 1,127  TAX PREP FEES 1,127  TAX PREP FEES 1,127			Revenue and			Disbursements for Charitable
TAX PREP FEES		Name of Organization or Person Providing Service	Expenses per Books	Net Investment Income	Adjusted Net Income	Purposes (Cash Basis Only)
2 3 4 5 6 6 7 7 8 9	-	l	1,127			1,127
3 4 5 6 7 7 8 9	7					
5 6 7 8 9 9	m					
5 6 7 8 9 9	4					
6 8 9 9	2					
8 9 9	ြဖ					
9 10	7					
9 10	∞					
10	6					
	9					

Line 18 (990-PF) - Taxes

		2,863	627	0	0	
		Revenue	-	7 7 7	Disbursements	
	Octobriogo	and Expenses	Net Investment	Adjusted Net Income	Tor Charleable Purposes	
PY FED E)	PY FED EXCISE TAX	826				
ESTIMATE	ESTIMATED EXCISE TAX PAID	1,410				_
FOREIGN	FOREIGN TAX WITHHELD	627	627			
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Revenue and Expenses         Net Investment Pdjusted Net For Charitable Income         Disbursements for Charitable Income           RUSTEE FEES         12         Purposes           DR FEES         12         Purposes           TATE AG FEES         25         25			37	12	0	25
Expenses Net Investment Adjusted Net for Charitable Description per Books Income Purposes TEE S E AG FEES  Add FEES  Adjusted Net for Charitable for Charita			Revenue and			Disbursements
Description         per Books         Income         Purposes           TEE FEES         12         12         12           E AG FEES         25         25         12			Expenses	Net Investment		for Charitable
TEE FEES 12 12 12 EES 25 E AG FEES 25 E AG F		Description	per Books	Income	Income	Purposes
12 12 12 12 12 12 15 15 15 15 15 15 15 15 15 15 15 15 15	ı⊢	EE FE				
E AG FEES 25	⋖	ш	12	12		
	ĮΩ	E AG FE	25			25
	1					
	1					
	1					

Part II, Line 13 (990-PF) - Investments - Other

3					
			940,040	897,990	1,053,081
		Basis of	Book Value	Book Value	FMV
	Item or Category	Valuation	Beg of Year	End of Year	End of Year
-			940,040	066'268	1,053,081
7					
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5					
9					
7					
8					
6					
10					

# Part III (990-PF) - Changes in Net Assets or Fund Balances

Line 3 - Other increases not included in Part III, Line 2		
1 GAIN ON PY SALES SETTLED IN CY	1	4,875
2 CTF INCOME TIMING DIFFERENCE	2	151
3 Total	3	5,026
Line 5 - Decreases not included in Part III, Line 2	4	CEE
COST BASIS ADJUSTMENT	1	655
,	1	~
1 COST BASIS ADJUSTMENT	1 2	655 2,987 1,034

# Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

		Amount											
	Long Term CG Distributions	797			F	710 00		73 417	-10.070	C	0	0	-10,070
	Short Term CG Distributions	5			lotais	1+0'00		1	١	•			
						Gross		Cost or Other		>	Adjusted Basis		
			¥0H	Date	Date	Sales	Depreciation	Basis Plus	Gain or	as of	as of	Excess of FMV	ō
	Kind(e) of Dimperty Sold	CUSIP#	-	Acquired	Sold	Price	Allowed	Expense of Sale	Loss	12/31/69	12/31/69	Over Adj Basis	Basis of Losses
•	WESTERN ASSET NON-US OPP BND-I	957663867		10/4/2011	10/4/2011 7/12/2012	6,019	0	9'000	19			0	91
-	MEGTEDN ASSET NON-11S OPP BND-1			5/20/2011	5/20/2011 7/12/2012	3,921	0	4,000	-79			0	9/-
4	WESTERN ASSET NON-11S OPP BND-1 #			10/5/2010	10/5/2010 7/12/2012	29,390	0	31,000	-1,610			0	010,1-
1	MODOAN STANIEV			6/23/2003	8/29/2012	3,017	0	7,560	4,543			0	4,543
4	DANK NEW YORK MELLON CORP COM 064058100	064058100		8/27/1999	5/11/2012	10,883	0	18,545	-7,662			0	-7,662
n «	- 1	057224107		10/5/2010	5/11/2012	6,091	0	6,312	-221			0	-221
-	┰╴					1,816	0	0	1,816				010,1
. ω	LONG TERM CTF GAIN					2,210	0	0	2,210				012,2
တ						0	0	0	0				
9						0	ח	ō	0				,

# Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

3	,		, , , , , , , , , , , , , , , , , , , ,							
										15,877
		Check "X"					Foreign		Average	
	Name	if Business	Street	Cıty	State	State Zip Code	Country	Title	Hours	Compen
_	Wells Fargo Bank N A. Trust T	×	101N Independence Mall E	MACY13 Philadelphia	ЬА	19106-2112			4.00	15,877
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Part VI, Line 6a (990-PF) - Estimated Tax Payments

		Date	Amount
1	Credit from prior year return	1	0
2	First quarter estimated tax payment	2	1,410
3	Second quarter estimated tax payment	3	
4	Third quarter estimated tax payment	4	
5	Fourth quarter estimated tax payment	5	
6	Other payments	6	0
7	Total	<u> 7</u>	1,410

Part XIII, Line 2a, Column C (990-PF) - Prior Year Undistributed Income		
1 Distributable amounts for 2010 that remained undistributed at the beginning of the 2011 tax year	1	48,986
2	2	
3	3	
4	4	<u> </u>
5	5	
6	6	
7	7	
8	8	
9	<u> </u>	
40 Total	10	48 986