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

OMB No 1545-0052

2012

Department of the Treasury
Internal Revenue Service

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

For calendar year 2012, or tax year beginning

, 2012, and ending

WISE FAMILY FOUNDATION, INC.
4309 CRAYTON ROAD
NAPLES, FL 34103A Employer identification number
65-6374303B Telephone number (see the instructions)
239-430-6240C 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 ☐G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name changeH Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ 1,528,690.
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 instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc. received (att sch)

100,000.

2 Check ☐ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

5,242.

5,242.

5,242.

4 Dividends and interest from securities

4,716.

4,716.

4,716.

5a Gross rents
b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

5,775.

b Gross sales price for all assets on line 6a 107,580.

7 Capital gain net income (from Part IV, line 2)

5,775.

8 Net short-term capital gain

4,774.

9 Income modifications

10a Gross sales less returns and allowances
b Less Cost of goods sold

c Gross profit/(loss) (att sch)

11 Other income (attach schedule)

SEE STATEMENT 1

45,784.

-2,641.

48,425.

12 Total. Add lines 1 through 11

161,517.

13,092.

63,157.

13 Compensation of officers, directors, trustees, etc

0.

14 Other employee salaries and wages

15 Pension plans employee benefits

16a Legal fees (attach schedule) SEE ST 2

578.

578.

b Accounting fees (attach sch)

17 Interest

14,257.

14,257.

18 Taxes (attach schedule (see instrs))

21,087.

938.

3,891.

19 Depreciation (attach sch) and depletion

11,030.

11,030.

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

SEE STATEMENT 4

22,578.

22,578.

24 Total operating and administrative expenses. Add lines 13 through 23

69,530.

938.

52,334.

25 Contributions, gifts, grants paid PART XV

74,500.

74,500.

26 Total expenses and disbursements. Add lines 24 and 25

144,030.

938.

52,334.

74,500.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

17,487.

b Net investment income (if negative, enter -0-)

12,154.

c Adjusted net income (if negative, enter -0-)

10,823.

SCANNED JUN 28 2013

RECEIVED JUN 28 2013 IRS

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Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
A S S E T S	1 Cash — non-interest-bearing		101,588.	101,588.
	2 Savings and temporary cash investments	354,680.	35,968.	35,968.
	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 instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges		15,956.	15,956.
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) STATEMENT 5	38,634.	32,608.	20,998.
	c Investments — corporate bonds (attach schedule) STATEMENT 6	70,012.	69,140.	69,677.
	11 Investments — land, buildings, and equipment basis	1,072,238.		
L I A B I L I T I E S	Less accumulated depreciation (attach schedule) SEE STMT 7	43,679.	833,112.	1,028,559.
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) STATEMENT 8	63,476.	56,128.	70,966.
	14 Land, buildings, and equipment basis			
	Less accumulated depreciation (attach schedule)			
	15 Other assets (describe SEE STATEMENT 9)	397,512.	388,538.	78,537.
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	1,757,426.	1,728,485.	1,528,690.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
N E T A S S E T S	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule) STMT 10	350,561.	302,518.	
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	350,561.	302,518.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
F U N D B A L A N C E S	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,406,865.	1,425,967.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	1,406,865.	1,425,967.	
	31 Total liabilities and net assets/fund balances (see instructions)	1,757,426.	1,728,485.	

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	1,406,865.
2 Enter amount from Part I, line 27a	2	17,487.
3 Other increases not included in line 2 (itemize) SEE STATEMENT 11	3	1,888.
4 Add lines 1, 2, and 3	4	1,426,240.
5 Decreases not included in line 2 (itemize) SEE STATEMENT 12	5	273.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	1,425,967.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month day year)	(d) Date sold (month day, year)
1 a	7000 ABERDEEN ASIA PAC INCOME FUND	P	4/03/12	12/03/12
b	10 FARMERS & MERCHANTS BANK	P	9/07/12	12/06/12
c	1000 ABERDEEN ASIA PAC INCOME FUND	P	8/08/11	12/03/12
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 55,291.		51,048.	4,243.
b 44,390.		43,859.	531.
c 7,899.		6,898.	1,001.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			4,243.
b			531.
c			1,001.
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	5,775.
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 instructions) If (loss), enter -0- in Part I, line 8] —	3	4,774.

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 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 (column (b) divided by column (c))
2011	84,600.	1,252,399.	0.067550
2010	50,000.	1,081,530.	0.046231
2009	38,412.	986,326.	0.038945
2008	42,000.	759,781.	0.055279
2007	37,740.	839,973.	0.044930

2 Total of line 1, column (d)	2	0.252935
3 Average distribution ratio for the 5-year base period— divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.050587
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	1,394,507.
5 Multiply line 4 by line 3	5	70,544.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	122.
7 Add lines 5 and 6	7	70,666.
8 Enter qualifying distributions from Part XII, line 4	8	74,500.

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.

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Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

1 a 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 instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	122.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	122.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	122.
6 Credits/Payments			
a 2012 estimated tax pmts and 2011 overpayment credited to 2012	6 a		
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		122.
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 2013 estimated tax	11		
	Refunded		

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) FL		
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? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i> SEE STATEMENT 13	X	

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation 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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>MURRAY WISE</u> Telephone no <u>239-430-6240</u> Located at <u>4309 CRAYTON ROAD NAPLES FL</u> ZIP + 4 <u>34103</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here and enter the amount of tax-exempt interest received or accrued during the year <u>N/A</u>	15		N/A
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
See 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
1 a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1 b	N/A
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 2012?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If 'Yes,' list the years <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement — see instructions.)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If 'Yes,' did it have excess business holdings in 2012 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 2012.)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4 b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5 a** During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

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

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

5 b N/A

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?N/A ☐ Yes ☐ No

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

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

6 b X

If 'Yes' to 6b, file Form 8870

7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7 b

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 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 STATEMENT 14		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 — see 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
NONE				

Total number of other employees paid over \$50,000

0

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 instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a Average monthly fair market value of securities	1 a	189,143.
b Average of monthly cash balances	1 b	299,625.
c Fair market value of all other assets (see instructions)	1 c	1,229,493.
d Total (add lines 1a, b, and c)	1 d	1,718,261.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	302,518.
3 Subtract line 2 from line 1d	3	1,415,743.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	21,236.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,394,507.
6 Minimum investment return. Enter 5% of line 5	6	69,725.

Part XI 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	69,725.
2 a Tax on investment income for 2012 from Part VI, line 5	2 a	122.
b Income tax for 2012 (This does not include the tax from Part VI)	2 b	
c Add lines 2a and 2b	2 c	122.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	69,603.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	69,603.
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, line 1	7	69,603.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 a	74,500.
b Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b Cash distribution test (attach the required schedule)	3 b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	74,500.
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	122.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	74,378.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				69,603.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				11,358.
f Total of lines 3a through e	11,358.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 74,500.				
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2012 distributable amount				69,603.
e Remaining amount distributed out of corpus	4,897.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	16,255.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	16,255.			
10 Analysis of line 9				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				11,358.
e Excess from 2012				4,897.

BAA

Form 990-PF (2012)

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
IOWA STATE UNIVERSITY PO BOX 2230 AMES, IA 50010	NONE	EDUC INST	TO FUND SCHOLARSHIPS FOR STUDENTS SELECTED BY UNIVERSITY.	60,500.
ROBERT LOCKE SCHOLARSHIP, NO IA COMM 500 COLLEGE DRIVE MASON CITY, IA 50401	NONE	EDUC INST	FUND SCHOLARSHIPS FOR STUDENTS SELECTED BY UNIVERSITY.	2,000.
ST ANN CATHOLIC SCHOOL 542 EIGHTH AVE., SOUTH NAPLES, FL 34102	NONE	EDUC INST	TO FUND SCHOLARSHIP FOR STUDENT SELECTED BY SCHOOL.	2,000.
MAYO CLINIC FOUNDATION 200 FIRST ST. SW ROCHESTER, MN 55905	NONE	EDUC INST	SCHOLARSHIP ASSISTANCE FOR STUDENTS SELECTED BY CLINIC.	10,000.
Total			3 a	74,500.
b Approved for future payment				
Total			3 b	

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF

OMB No 1545-0047

2012

Name of the organization

WISE FAMILY FOUNDATION, INC.

Employer identification number

65-6374303

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Form 990-PF

Section:

- ☐ 501(c)(____) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization
- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$ _____

Caution: An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it **must** answer 'No' on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on Part I, line 2, of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule **B** (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization

Employer identification number

WISE FAMILY FOUNDATION, INC.

65-6374303

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MURRAY R WISE 4309 CRAYTON ROAD NAPLES, FL 34103	\$ 100,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
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			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization

Employer identification number

WISE FAMILY FOUNDATION, INC.

65-6374303

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

BAA

Employer identification number

65-6374303

organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

► \$ N/A

2012

FEDERAL STATEMENTS

PAGE 1

WISE FAMILY FOUNDATION, INC.

65-6374303

STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
FARM REVENUE	\$ 48,425.		\$ 48,425.
LAACO NET K-1 INCOME	1,547.	1,547.	
STARK BANK K-1 NET LOSS	-4,188.	-4,188.	
TOTAL	\$ 45,784.	\$ -2,641.	\$ 48,425.

STATEMENT 2
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	\$ 578.		\$ 578.	
TOTAL	\$ 578.	\$ 0.	\$ 578.	\$ 0.

STATEMENT 3
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
2011 FEDERAL TAX ON 990-PF INVEST INCOME	\$ 303.			
2011 FEDERAL TAX ON 990-T FARM INCOME	11,254.			
2011 IA TAXES ON FARM INCOME	4,701.			
FARM PROPERTY TAXES	3,891.		\$ 3,891.	
INVESTMENT LOTS PROPERTY TAXES	938.	\$ 938.		
TOTAL	\$ 21,087.	\$ 938.	\$ 3,891.	\$ 0.

STATEMENT 4
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AMORTIZATION	\$ 250.		\$ 250.	N/A
FARM OPERATING EXPENSES	22,182.		22,182.	
MISCELLANEOUS	146.		146.	
TOTAL	\$ 22,578.	\$ 0.	\$ 22,578.	\$ 0.

WISE FAMILY FOUNDATION, INC.

65-6374303

STATEMENT 5
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

<u>CORPORATE STOCKS</u>	<u>VALUATION METHOD</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
STOCK AT SCHWAB & STD CHARTERED	COST	\$ 32,608.	\$ 20,998.
	TOTAL	<u>\$ 32,608.</u>	<u>\$ 20,998.</u>

STATEMENT 6
FORM 990-PF, PART II, LINE 10C
INVESTMENTS - CORPORATE BONDS

<u>CORPORATE BONDS</u>	<u>VALUATION METHOD</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
BONDS AT SCHWAB	COST	\$ 69,140.	\$ 69,677.
	TOTAL	<u>\$ 69,140.</u>	<u>\$ 69,677.</u>

STATEMENT 7
FORM 990-PF, PART II, LINE 11
INVESTMENTS - LAND, BUILDINGS, AND EQUIPMENT

<u>CATEGORY</u>	<u>BASIS</u>	<u>ACCUM. DEPREC.</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
MACHINERY AND EQUIPMENT IMPROVEMENTS	\$ 0.	\$ 0.	\$ 0.	\$ 1,135,000.
	1,072,238.	43,679.	1,028,559.	0.
TOTAL	<u>\$ 1,072,238.</u>	<u>\$ 43,679.</u>	<u>\$ 1,028,559.</u>	<u>\$ 1,135,000.</u>

STATEMENT 8
FORM 990-PF, PART II, LINE 13
INVESTMENTS - OTHER

<u>OTHER PUBLICLY TRADED SECURITIES</u>	<u>VALUATION METHOD</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
MAIRS & POWERS MUTUAL FUND	COST	\$ 12,421.	\$ 21,126.
LAACO PARTNERSHIP INTEREST	COST	13,530.	19,840.
TOTAL OTHER PUBLICLY TRADED SECURITIES		<u>\$ 25,951.</u>	<u>\$ 40,966.</u>
<u>OTHER SECURITIES</u>			
STARK BANK - S CORP STOCK	COST	30,177.	30,000.
TOTAL OTHER SECURITIES		<u>\$ 30,177.</u>	<u>\$ 30,000.</u>
	TOTAL	<u>\$ 56,128.</u>	<u>\$ 70,966.</u>

2012

FEDERAL STATEMENTS

PAGE 3

WISE FAMILY FOUNDATION, INC.

65-6374303

STATEMENT 9
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

 CSV LIFE INSURANCE
 FMV OF OTHER ASSETS
 NET INTANGIBLE ASSETS
 VACANT LOTS

	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
	\$ 254,148.	
		\$ 78,537.
	1,412.	
	132,978.	
TOTAL	<u>\$ 388,538.</u>	<u>\$ 78,537.</u>

STATEMENT 10
FORM 990-PF, PART II, LINE 21
MORTGAGES AND OTHER NOTES PAYABLE
MORTGAGES PAYABLE

MIDLAND LOAN SERVICES

	<u>BALANCE DUE</u>
	\$ 302,518.
TOTAL MORTGAGES PAYABLE	<u>\$ 302,518.</u>

STATEMENT 11
FORM 990-PF, PART III, LINE 3
OTHER INCREASES

PRIOR PERIOD ADJUSTMENTS

	\$ 1,888.
TOTAL	<u>\$ 1,888.</u>

STATEMENT 12
FORM 990-PF, PART III, LINE 5
OTHER DECREASES

PENALTIES

	\$ 273.
TOTAL	<u>\$ 273.</u>

STATEMENT 13
FORM 990-PF, PART VII-A, LINE 10
SUBSTANTIAL CONTRIBUTORS DURING THE TAX YEAR
NAME OF SUBSTANTIAL CONTRIBUTORADDRESS OF SUBSTANTIAL CONTRIBUTOR

MURRAY R WISE

 4309 CRAYTON ROAD
 NAPLES, FL 34103

WISE FAMILY FOUNDATION, INC.

65-6374303

STATEMENT 14
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
MURRAY R WISE 4309 CRAYTON ROAD NAPLES, FL 34103	PRES & DIRECTOR 0	\$ 0.	\$ 0.	\$ 0.
VALERIE G WISE 4309 CRAYTON ROAD NAPLES, FL 34103	VP & DIRECTOR 0	0.	0.	0.
MICHAEL P SEPTER 1794 WOODSTONE DR. VICTORIA, MN 55386	DIRECTOR 0	0.	0.	0.
JOHN B KIRKPATRICK PO BOX 537 CLARION, IA 50525	DIRECTOR 0	0.	0.	0.
JAMIE KNIGHT 490 NOTTINGHAM DR. NAPLES, FL 34109	SEC/TREASURER 0	0.	0.	0.
TOTAL		\$ 0.	\$ 0.	\$ 0.

12/31/12

2012 FEDERAL BOOK DEPRECIATION SCHEDULE

PAGE 1

WISE FAMILY FOUNDATION, INC.

65-6374303

NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS PCT.	CUR 179 BONUS	SPECIAL DEPR ALLOW.	PRIOR 179/ BONUS/ SP. DEPR.	PRIOR DEC BAL DEPR.	SALVAG /BASIS REDUCT.	DEPR BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.
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FORM 990/990-PF

AMORTIZATION

1	LOAN-FEES	9/06/08		2,500							2,500			S/L	10		250
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TOTAL AMORTIZATION

				2,500		0	0	0	0	0	2,500						250
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IMPROVEMENTS

3	HUMBOLDT 80 TILE	3/01/08		40,000							40,000	10,223		S/L	15		2,667
4	HUMBOLDT 80 FENCE	3/01/08		4,500							4,500	1,725		S/L	10		450
5	HUMBOLDT 80 FENCE	6/30/09		13,169							13,169	3,292		S/L	10		1,317
6	HUMBOLDT 80 TILE	6/30/10		34,521							34,521	3,452		S/L	15		2,301
8	KOSSUTH 80 TILE	3/01/08		45,000							45,000	11,333		S/L	15		3,000
9	KOSSUTH 80 FENCE	3/01/08		3,500							3,500	1,342		S/L	10		350
12	KOSSUTH 80 TILE	12/13/12		50,969							50,969			S/L	15		283
14	DOUGLAS 16 TILE	12/14/12		8,500							8,500			S/L	15		47
15	DOUGLAS FENCE	12/14/12		800							800			S/L	7		10

TOTAL IMPROVEMENTS

				200,959		0	0	0	0	0	200,959	31,367					10,425
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LAND

2	HUMBOLDT 80 ACRES - IA	3/01/08		334,012							334,012						0
7	KOSSUTH 80 ACRES - IA	3/01/08		393,881							393,881						0
13	DOUGLAS 16 ACRES - IL	12/14/12		140,359							140,359						0

TOTAL LAND

				868,252		0	0	0	0	0	868,252	0					0
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WISE FAMILY FOUNDATION, INC.

65-6374303

NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS PCT.	CUR 179 BONUS	SPECIAL DEPR ALLOW.	PRIOR 179/ BONUS/ SP. DEPR.	PRIOR DEC BAL DEPR.	SALVAGE /BASIS REDUCT.	DEPR BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.
MACHINERY AND EQUIPMENT																
10	KOSSUTH 80 EQUIPMENT	6/30/09		1,872							1,872	935	S/L	5		374
11	KOSSUTH 80 EQUIPMENT	6/30/10		1,155							1,155	347	S/L	5		231
TOTAL MACHINERY AND EQUIPME																
				3,027	0	0	0	0	0	0	3,027	1,282				
TOTAL DEPRECIATION				1,072,238	0	0	0	0	0	0	1,072,238	32,649				
GRAND TOTAL AMORTIZATION				2,500	0	0	0	0	0	0	2,500	838				
GRAND TOTAL DEPRECIATION				1,072,238	0	0	0	0	0	0	1,072,238	32,649				