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

OMB No 1545-0052

2013

Department of the Treasury
Internal Revenue ServiceDo not enter Social Security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning

09-01, 2013, and ending

08-31, 2014

Name of foundation WENDELL AND BEULAH WHEELER FAMILY		A Employer identification number 48-1250163
Number and street (or P.O. box number if mail is not delivered to street address) P O BOX 8593	Room/suite	B Telephone number (see instructions) (620) 933-2323
City or town, state or province, country, and ZIP or foreign postal code PRATT, KS 67124		C If exemption application is pending, check here ☐
G Check all that apply		D 1. Foreign organizations, check here ☐
☐ Initial return	☐ Initial return of a former public charity	2. Foreign organizations meeting the 85% test, check here and attach computation ☐
☐ Final return	☐ Amended return	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
☐ Address change	☐ Name change	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,997,544	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 (attach schedule)				
2	Check ☒ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	184	184		
4	Dividends and interest from securities	46,178	46,178		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10 STM139	21,997			
b	Gross sales price for all assets on line 6a 93,844				
7	Capital gain net income (from Part IV, line 2)		21,997		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	68,359	68,359		
13	Compensation of officers, directors, trustees, etc.				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) STM108	1,060			1,060
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions) STM110	1,230			1,230
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications	210	210		
23	Other expenses (attach schedule)				
24	Total operating and administrative expenses. Add lines 13 through 23	2,500	210		2,290
25	Contributions, gifts, grants paid	62,000			62,000
26	Total expenses and disbursements. Add lines 24 and 25	64,500	210		64,290
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	3,859			
b	Net investment income (if negative, enter -0-)		68,149		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

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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
Assets	1 Cash - non-interest-bearing	306,164	14,038	14,038
	2 Savings and temporary cash investments	158,271	395,804	395,804
	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 schedule) ▶ Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations (attach schedule)	550,017	633,928	666,627
	b Investments - corporate stock (attach schedule) STM137	681,379	670,617	862,178
	c Investments - corporate bonds (attach schedule) STM138	50,353	50,353	58,897
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	1,746,184	1,764,740	1,997,544	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,746,184	1,764,740	
	30 Total net assets or fund balances (see instructions)	1,746,184	1,764,740	
31 Total liabilities and net assets/fund balances (see instructions)	1,746,184	1,764,740		

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	1,746,184
2 Enter amount from Part I, line 27a	2	3,859
3 Other increases not included in line 2 (itemize) ▶ STM115	3	14,697
4 Add lines 1, 2, and 3	4	1,764,740
5 Decreases not included in line 2 (itemize) ▶ STM116	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,764,740

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P-Purchase D-Donation	(c) Date acquired (yr, mo, day)	(d) Date sold (yr, mo, day)
1a	1000 SHARES SPARTAN MOTORS	P	2008-07-30	2013-11-22
b	300 SHARES KIMBERLY CLARK CORP	P	2010-04-16	2013-11-22
c	500 SHARES AIR PRODUCTS CHEMICALS	P	2008-01-07	2013-11-22
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 6,447		5,903	544
b 32,665		18,544	14,121
c 54,732		47,401	7,331
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			544
b			14,121
c			7,331
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	21,997
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	

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 (col (b) divided by col (c))
2012	57,777	1,767,123	0.032696
2011	88,336	1,691,237	0.052232
2010	68,740	1,620,450	0.04242
2009	56,466	1,574,302	0.035867
2008	70,591	1,332,030	0.052995

2 Total of line 1, column (d)	2	0.21621
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	0.043242
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,924,232
5 Multiply line 4 by line 3	5	83,208
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	681
7 Add lines 5 and 6	7	83,889
8 Enter qualifying distributions from Part XII, line 4 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	8	64,290

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	1,363
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	1,363
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	1,363
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	
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	1,363
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 2014 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ KS		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation		
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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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?	13	X	
Website address N/A				
14	The books are in care of FREDERICK S LOOMIS Telephone no 620-933-2323			
Located at P O BOX 8593, PRATT, KS ZIP+4 67124				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041-Check here and enter the amount of tax-exempt interest received or accrued during the year	15		☐
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country	16	Yes	No
				X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ☐ 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)	2b	X
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2013 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 2013)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ 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)? ☐ Yes ☒ No

Organizations relying on a current notice regarding disaster assistance check here ☐

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

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
FREDERICK S LOOMIS P O BOX 8593, PRATT, KS 67124	DIRECTOR 4	0	0	0
DEAN GAMBLE P O BOX 8593, PRATT, KS 67124	DIRECTOR 1	0	0	0
DARRIN HEADRICK P O BOX 8593, PRATT, KS 67124	DIRECTOR 1	0	0	0
PAUL CONNER P O BOX 8593, PRATT, KS 67124	DIRECTOR 1	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
Total number of others receiving over \$50,000 for professional services		▶

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NOT APPLICABLE	
2	0
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	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	▶

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	1a	1,948,551
b	Average of monthly cash balances	1b	4,984
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,953,535
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,953,535
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	29,303
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,924,232
6	Minimum investment return. Enter 5% of line 5	6	96,212

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	
2a	Tax on investment income for 2013 from Part VI, line 5	2a	
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
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	

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	1a	64,290
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	64,290
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	64,290

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years				
3 Excess distributions carryover, if any, to 2013				
a From 2008	70,591			
b From 2009	56,466			
c From 2010	68,740			
d From 2011	88,336			
e From 2012	57,777			
f Total of lines 3a through e	341,910			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ <u>64,290</u>				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				
e Remaining amount distributed out of corpus	64,290			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	406,200			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	70,591			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	335,609			
10 Analysis of line 9				
a Excess from 2009	56,466			
b Excess from 2010	68,740			
c Excess from 2011	88,336			
d Excess from 2012	57,777			
e Excess from 2013	64,290			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2013	(b) 2012	(c) 2011	(d) 2010	
0	59,516	65,489	77,682	202,687
	50,589	55,666	66,030	172,285

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

64,290				64,290
--------	--	--	--	--------

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

64,290				64,290
--------	--	--	--	--------

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test - enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

64,141				64,141
--------	--	--	--	--------

c "Support" alternative test - enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see instructions.)

1 Information Regarding Foundation Managers:

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

NOT APPLICABLE,

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

NOT APPLICABLE,

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

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

a The name, address, and telephone number or e-mail of the person to whom applications should be addressed

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

c Any submission deadlines

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

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

Recipient 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 SEE ATTACHED SCHEDULE SEE ATTACHED SCHEDULE PRATT, KS 67124	NONE	PC	SCHOLARSHIP	62,000
Total			3a	62,000
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

EEA

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received		

[illegible]

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				
	Signature of officer or trustee	Date 1/12/15	Title PRESIDENT	May the IRS discuss this return with the preparer shown below (see inst.)? ☒ Yes ☐ No	

Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature	Date	Check ☒ if self-employed	PTIN
	THOMAS A. PENKA			01-09-2015		P00018368
	Firm's name ▶ PENKA ACCOUNTING			Firm's EIN ▶ 48-0902542		
	Firm's address ▶ 504 S MAIN PRATT KS 67124			Phone no 620-672-2050		

Federal Supporting Statements**2013 PG 01**

Name(s) as shown on return

Your Social Security Number

WENDELL AND BEULAH WHEELER FAMILY

48-1250163

**FORM 990PF, PART XV, LINE 2
APPLICATION SUBMISSION INFORMATION****GRANT PROGRAM**

SCHOLARSHIPS

APPLICANT NAME

FREDERICK S LOOMIS

ADDRESS118 EAST THIRD
PRATT, KS 67124**TELEPHONE**

620-933-2323

EMAIL ADDRESS**FORM & CONTENT**

SEE ATTACHED APPLICATION

SUBMISSION DEADLINE

APPLICATIONS AT ANYTIME

RESTRICTIONS ON AWARD

PREFERENCE GIVEN TO KIOWA COUNTY KANSAS STUDENTS ATTENDING COLLEGE

Federal Supporting Statements

2013 PG 01

Name(s) as shown on return

FEIN

WENDELL AND BEULAH WHEELER FAMILY

48-1250163

FORM 990PF, PART III, LINE 3 OTHER INCREASES SCHEDULE

STATEMENT #115

TAX EXEMPT INT	14,697
TOTAL	14,697

FORM 990PF, PART III, LINE 5 OTHER DECREASES SCHEDULE

PG 01
STATEMENT #116

INCOME RECIEVED IN STOCK	
TOTAL	

FORM 990PF, PART II, LINE 10(A) INVESTMENTS: U.S. GOVERNMENT OBLIGATION SCHEDULE

PG 01
STATEMENT #136

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
SEE ATTACHED BREAKDOWN	550,017	633,928	666,627
TOTALS	550,017	633,928	666,627

FORM 990PF, PART II, LINE 10(B) INVESTMENTS: CORPORATE STOCK SCHEDULE

PG 01
STATEMENT #137

CATEGORY	BOY	BOOK VALUE	EOY FMV
SEE ATTACHED BREAKDOWN	681,379	670,617	862,178
TOTALS	681,379	670,617	862,178

Federal Supporting Statements

2013 PG 01

Name(s) as shown on return

FEIN

WENDELL AND BEULAH WHEELER FAMILY

48-1250163

FORM 990PF, PART II, LINE 10(C) INVESTMENTS: CORPORATE BOND SCHEDULE

STATEMENT #138

<u>CATEGORY</u>	<u>BOY</u>	<u>BOOK VALUE</u>	<u>EOY FMV</u>
SEE ATTACHED BREAKDOWN	50,353	50,353	58,897
TOTALS	50,353	50,353	58,897

FORM 990PF, PART I, LINE 6(A) GAIN(LOSS) FROM SALE OF OTHER ASSETS SCHEDULE

PG 01
 STATEMENT #139

Federal Supporting Statements

2013 PG 01

Your Social Security Number
48-1250163

Name(s) as shown on return

WENDELL AND BEULAH WHEELER FAMILY

STATEMENT #108

FORM 990PF, PART I, LINE 16(B) - ACCOUNTING FEES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
ACCOUNTING FEES	1,060	0	0	1,060
TOTALS	1,060	0	0	1,060

PG 01

STATEMENT #110

FORM 990PF, PART I, LINE 18 - TAXES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
TAXES	1,230	0	0	1,230
TOTALS	1,230	0	0	1,230

Beulah Wheeler Family Foundation
48-1250163

Investments		09/01/2013	Book value	08/31/2014	Fair Market Value
					08/31/2014
Marion County Hospital 7% Mty 12/1/2018		\$65,002 47		\$65,002.50	\$65,359 45
Marion County Hospital 7 25% Mty 12/1/2019		\$70,002 45		\$70,002 50	\$70,373 10
Marion County Hospital 7 5% Mty 12/1/2020		\$65,002 47		\$65,002 50	\$65,973 05
Kansas Rural Water Finance Authority 4 25% 10/1/28		\$100,002 50		\$100,002 50	\$107,301 00
Kansas St Dev Finance Authority 6 2% 5/1/28		\$50,002 50		\$50,002 50	\$58,129 50
Maize KS Pub Building 4 75% 5/1/25		\$100,002 50		\$100,002.50	\$102,861 00
Cherokee County KS Rurakl Water 3 5% 8/1/2027		\$100,002 50		\$100,002 50	\$98,721 00
Pratt County Public Building 3 125% 12/1/2028		\$0 00		\$83,910 50	\$97,909 00
Totals		\$550,017 39		\$633,928 00	\$666,627 10
Corporate Bonds					
Bear Sterns		\$50,352 50		\$50,352 50	\$58,896 50
Totals		\$50,352 50		\$50,352 50	\$58,896 50
Equities					
	Shares				
Air Products & Chemicals	500 000	\$47,400 75		\$0 00	\$0 00
American Electric Power	1000 000	\$30,032 40		\$30,032 40	\$53,700 00
Annaly Capital Management	1000 000	\$18,410 80		\$18,410 80	\$11,900 00
Annaly Capital Management	1000 000	\$0 00		\$10,371 50	\$11,900 00
Apple Inc Split 6/9/14	700 000	\$41,167 15		\$41,167 15	\$71,750 00
A T & T	1000 000	\$28,212 40		\$28,212 40	\$34,960 00
A T & T	1000 000	\$30,560 90		\$30,560 90	\$34,960 00
Bank of America	1000.000	\$41,328 50		\$41,328 50	\$16,090 00
Bank of the Ozarks Split 6/24/14	1500 000	\$11,451 00		\$11,451 00	\$63,900 00
Citigroup	100 000	\$28,392 50		\$28,392 50	\$5,165 00
Citigroup	400 000	\$0 00		\$20,824 50	\$20,660 00
Energizer Holdings Inc	500 000	\$32,991 35		\$32,991 35	\$60,760 00
The Coca-Cola Company	500 000	\$0 00		\$20,240 50	\$20,860 00
The Dow Chemical Company	500 000	\$18,997 45		\$18,997.45	\$26,775 00
The Dow Chemical Company	500 000	\$12,591 50		\$12,591 50	\$26,775 00
Exxon-Mobil Corporation	500 000	\$41,616.75		\$41,616 75	\$49,730 00
General Electric Company	1000 000	\$36,169.50		\$36,169 50	\$25,980 00
Great Plains Energy Inc	1000.000	\$28,452 50		\$28,452 50	\$25,670 00
Johnson & Johnson	500 000	\$32,372.45		\$32,372.15	\$61,866 00
JP Morgan	500.000	\$18,281 95		\$18,281 95	\$29,725 00
Kimberly - Clark Corporation	200 000	\$30,906 70		\$12,362 68	\$21,600 00
Merck & Company	1000 000	\$33,250 50		\$33,250 50	\$60,110 00
Pfizer Incorporated from Wyeth	492 000	\$7,093 61		\$7,091 24	\$14,459 88
Pfizer Incorporated	1000 000	\$18,652 40		\$18,647 57	\$29,390 00
PNC previously National City Corp	58 000	\$21,954 54		\$21,954 54	\$4,915.50
Spartan Motors Inc	1000 000	\$5,902.50		\$0 00	\$0 00
Walgreen Co	500 000	\$17,602 45		\$17,602 45	\$30,260 00
Wells Fargo & CO	500 000	\$13,247.50		\$13,247 50	\$25,720 00
Garmin, Ltd	200 000	\$0 00		\$9,656 50	\$10,866 00
Garmin, Ltd	400 000	\$34,338 50		\$34,338 50	\$21,732 00
Totals		\$681,378 55		\$670,617 08	\$862,178 38

Wendell and Beulah Wheeler Family Foundation

48-1250163

Grants and Contributions Paid during the Year or Approved for Future Payment 2014

Paid during the Year	Relationship	Status	Purpose	Amount
Pratt Community College and Canyon E Packard 348 NE Highway 61, Pratt, KS 67124	None	Individual	Scholarship	\$1,000 00
Hutchinson Community College and Francisco A Torres 1300 N Plum, Hutchinson, KS 67501	None	Individual	Scholarship	\$500 00
Cowley County Community College and Patricia Torres 125 S 2nd Street, Arkansas City, KS 67005	None	Individual	Scholarship	\$500 00
Hutchinson Community College and Tucker Mckinney 1300 N Plum, Hutchinson, KS 67501	None	Individual	Scholarship	\$1,000 00
Kansas State University and Ross K Binford 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,500 00
Fort Hays University and Taylor Ardrey 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$250 00
Barclay College and Caleb S Davis 607 N Kingman Haviland, KS 67059	None	Individual	Scholarship	\$500 00
Wichita State University and Morgan L Fulton 1845 Fairmount, Wichita, Kansas 67260	None	Individual	Scholarship	\$750 00
Kansas State University and Rustin C Ardery 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$2,000 00
Fort Hays University and Lakin B Titus 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$1,000 00
Cowley County Community College and Charity D Schmidt 125 S 2nd Street, Arkansas City, KS 67005	None	Individual	Scholarship	\$500 00
Wichita State University and Colten J Sharp-Ebert 1845 Fairmount, Wichita, Kansas 67260	None	Individual	Scholarship	\$2,000 00
Friends University and Kaelie A Kendall 2100 W University Ave, Wichita, Kansas 67213	None	Individual	Scholarship	\$1,000 00
Pratt Community College and Colter L. Brown 348 NE Highway 61, Pratt, KS 67124	None	Individual	Scholarship	\$500 00
Kansas State University and Elizabeth P. Lutz 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$750 00
Kansas State University and Kirsten M Spainhour 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$2,000 00

Wendell and Beulah Wheeler Family Foundation

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Grants and Contributions Paid during the Year or Approved for Future Payment 2014

Paid during the Year	Relationship	Status	Purpose	Amount
Emporia State University and Chelsea D Oberle 1200 Commerical, Emporia, Kansas 66801	None	Individual	Scholarship	\$2,000 00
Wichita State University and Markala C Morton 1845 Fairmount, Wichita, Kansas 67260	None	Individual	Scholarship	\$2,000 00
Northwestern Oklahoma University and Rachael D Schmidt 709 Oklahoma Blvd , Alva, OK 73717	None	Individual	Scholarship	\$1,000 00
Wichita State University and Thomas Deistern 1845 Fairmount, Wichita, Kansas 67260	None	Individual	Scholarship	\$250 00
Fort Hays Unviersity and Dena J Liggett 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$1,000 00
Kansas State University and Eric J Spurgeon 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$250 00
Kansas State University and Katelynee K Gamble 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,000 00
Kansas State University and Chloe N Enfield 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$2,000 00
Fort Hays and Cassie Price 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$1,500 00
Fort Hays and Lindy A McKinney 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$500 00
Kansas State University and Riann P Heft 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,000 00
Kansas State University and Rebekah L Fillmore 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$2,000 00
Fort Hays State University and Amory M Miller 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$250 00
Fort Hays Unviersity and Heather Q Melton 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$1,000 00
Kansas State University and Halie J Headrick 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$2,000 00
Kansas State University and Kadie R Larsh 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,000 00

Wendell and Beulah Wheeler Family Foundation

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Grants and Contributions Paid during the Year or Approved for Future Payment 2014

Paid during the Year	Relationship	Status	Purpose	Amount
Butler County Community College and Lyman W Morehead 901S Haverhill Road, El Dorado, KS 67042	None	Individual	Scholarship	\$500 00
Kansas State University and Ty J Schaef 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,250 00
Kansas State University and Darren W Hayse 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$750 00
Kansas State University and Conner A Staats 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$250 00
Virginia Commonwealth University and Jamie Larsh 821 West Franklin Sreet, Richmond, VA 23284-2526	None	Individual	Scholarship	\$750 00
Kansas State University and Heidee K Prosser 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,000 00
Kansas State University and Mackenzie D Rose 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,000 00
North Park University and Lillian E Hinshaw 3225 W Foster Ave, Chicago, IL 60625	None	Individual	Scholarship	\$1,000 00
Fort Hays and Katlin Sens 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$250 00
Northwestern OK Univesity and Erica L Bertram 709 Oklahoma Blvd , Alva, OK 73717	None	Individual	Scholarship	\$2,000 00
Northwestern OK Univesity and Angela L Liggett 709 Oklahoma Blvd , Alva, OK 73717	None	Individual	Scholarship	\$2,000 00
Pratt Community College and Payton D. Miller 348 NE Highway 61, Pratt, KS 67124	None	Individual	Scholarship	\$500 00
Wichita State University and Kadie R Larsh 1845 Fairmount, Wichita, Kansas 67260	None	Individual	Scholarship	\$1,000 00
Kansas State University and Keenan M Behee 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,000 00
Fort Hays University and Trever A Powell 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$1,000 00
Rockhurst College and Bailey E Rush 1100 Rockhurst Road, Kansas City, MO 64110	None	Individual	Scholarship	\$250 00

Wendell and Beulah Wheeler Family Foundation
48-1250163

Grants and Contributions Paid during the Year or Approved for Future Payment 2014

Paid during the Year	Relationship	Status	Purpose	Amount
Friends University and Mattox P Wade 2100 W University Ave, Wichita, Kansas 67213	None	Individual	Scholarship	\$1,500 00
Cowley County Community College and Damien M Ogle 125 S 2nd Street, Arkansas City, KS 67005	None	Individual	Scholarship	\$1,000 00
Dodge City Community College and Lyman W Moorehead 2501 N 14th Avenue, Dodge City, Kansas 67801	None	Individual	Scholarship	\$500 00
Barclay College and Kaelie A Kendall 607 N Kingman, Haviland, KS 67059	None	Individual	Scholarship	\$500 00
Seward County Community College and Keith R Prosser 1801 N Kansas Ave , Liberal, KS 67905	None	Individual	Scholarship	\$1,000 00
Pratt Community College and Darin W McVay 348 NE Highway 61, Pratt, KS 67124	None	Individual	Scholarship	\$500 00
Oklahoma State University and Morgan V Tyree 119 Student Union, Stillwater, OK 74078	None	Individual	Scholarship	\$1,000 00
Fort Hays University and Brandon S Taylor 600 Park Street, Hays, Kansas 67601	None	Individual	Scholarship	\$750 00
Kansas State University and Montana W Ralstin 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,000 00
Friends University and Kirstin A Wade 2100 W University Ave, Wichita, Kansas 67213	None	Individual	Scholarship	\$2,000 00
Kansas State University and Jordan W Wyrick 118 Anderson Hall, Manhattan, Kansas 66506	None	Individual	Scholarship	\$1,500 00
Northwestern Oklahoma University and Evan D Jacks 709 Oklahoma Blvd, Alva, OK 73717	None	Individual	Scholarship	\$1,000 00
Oklahoma Panhandle University and Dezere D Luna PO Box 430, Goodwell, OK 73939	None	Individual	Scholarship	\$750 00
Total				\$62,000 00

THE WENDELL AND BEULAH WHEELER
FAMILY FOUNDATION GRANT APPLICATION

APPLICANT INFORMATION

Social Security # _____ Last Name _____ First Name _____ MI _____

Home / Legal Address _____ City _____ State _____ Zip _____ Home/Legal Phone # _____

County of Legal Residence _____ Name of High School _____ Year of Graduation/GED _____

Post Secondary School _____ Name _____ Address _____

Will you be a full-time student (12 or more credit hours per semester)? ☐ Yes ☐ No

Have you attended any other post-secondary school? If "Yes" ☐ Yes ☐ No
explain on separate sheet.

Are you a high school graduate? ☐ Yes ☐ No

Have you applied for and / or received any other scholarship, grant, or loan? ☐ Yes ☐ No

Please explain: _____

What is your anticipated major or course of study? _____

Do you plan to attend any other post-secondary school? _____

State your employment history beginning with the most recent employment. State the name, address, phone number and dates of employment. give a brief description of your job description your signature at the end of this application is consent and authorization for the foundation to inquire into your background, including without limitation, your employment history.

List the names and ages of all dependents of parents. Indicate which, if any, will be attending post-secondary schools.

ACADEMIC VERIFICATION

If you are a high school graduate or if you have less than 12 hours of post-secondary school credit, you must provide a verified high school GPA or GED score. If this section is not complete, you will not be considered for a scholarship.

HIGH SCHOOL GPA is _____ based on 4.0 scale, or GED Average Score _____

COLLEGE GPA is _____ based on 4.0 scale, based on _____ credits

ACT SCORES Composite _____ English _____ Math _____
Reading _____ Science _____

Signature of School Official _____ Title _____ Date _____

Name of School _____ City _____ State _____

COMMUNITY AND SCHOOL RELATED ACTIVITIES AND ORGANIZATIONS

☐ Athletic (Specify) _____

☐ Art ☐ Drama ☐ Band ☐ Chorus ☐ Cheerleading/Dance

☐ STUCCO/Student Government ☐ Publications/Yearbook ☐ Community Service

☐ Speech/Debate ☐ FFA

☐ Other _____

STUDENT INCOME INFORMATION

Please use most recent federal tax return information.

Are you employed? ☐ Yes ☐ No If yes, annual adjusted gross income _____

Employer's name and address: _____

Are you married? ☐ Yes ☐ No If married, spouse's annual adjusted gross income: _____

Spouse's employer's name and address: _____

Date of Birth _____ / _____ / _____
Month Day YearDo you have children who receive more than half their support from you? ☐ Yes ☐ NoAre you an orphan or ward of a court? ☐ Yes ☐ NoAre you a veteran of the US Armed Forces? ☐ Yes ☐ NoDo you have dependents (other than your children or spouse)
that receive more than half of their support from you? ☐ Yes ☐ No*Please list the name, age, and relationship to you of each of your dependents below.*_____
_____State any prior or current criminal record. ☐ None ☐ See Separate Sheet
Do not include traffic infractions

If you are claimed as a dependent by your parents or other claimants.

PARENTS' INFORMATION

Please use most recent federal tax return information.

Father's name _____

Address _____

Employer _____ Annual Adjusted Gross Income _____

Mother's name _____

Address _____

Employer _____ Annual Adjusted Gross Income _____

PERSONAL STATEMENT

If you wish to be considered for a grant, please use the space provided to write a personal statement. Write any statement you wish about your application for a grant. List any clubs, organizations, honors, awards, leadership roles, or experiences that you feel enhance your candidacy for a grant. If you need additional space, please attach additional sheets. Include any special needs you or your family have that you believe creates a need for a financial grant.

STATEMENT OF APPLICATION

I have read the foregoing application in full and hereby state that, to my knowledge, it is accurate and that I am applying for financial assistance to further my education. I understand that if this application is not complete, it will not be considered by the grant committee. I further agree that The Wendell and Beulah Wheeler Family Foundation is authorized to release any and all information related to verification of scholarship eligibility to any third party of interest. I also give permission for my name and other general information to be released by The Wendell and Beulah Wheeler Family Foundation if I am awarded a grant.

SIGNATURE OF APPLICANT

DATE