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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014, and ending 12-31-2014

Name of foundation THE WILSON FAMILY FOUNDATION		A Employer identification number 56-2042058	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 2278		B Telephone number (see instructions) (336) 881-3600	
City or town, state or province, country, and ZIP or foreign postal code HIGH POINT, NC 27261		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 40,101,093		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	852,911	852,911		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,550,357			
	b Gross sales price for all assets on line 6a 3,498,867				
	7 Capital gain net income (from Part IV, line 2) . . .		1,550,357		
	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	2,403,268	2,403,268		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	2,560	2,560		0
	b Accounting fees (attach schedule)	1,420	1,420		0
	c Other professional fees (attach schedule)	118,730	118,730		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	7,699	7,699		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	130,409	130,409		0
	25 Contributions, gifts, grants paid	1,767,000			1,767,000
	26 Total expenses and disbursements. Add lines 24 and 25	1,897,409	130,409		1,767,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	505,859			
	b Net investment income (if negative, enter -0-)		2,272,859		
	c Adjusted net income (if negative, enter -0-)				

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	200		
	2	Savings and temporary cash investments	2,754,255	4,955,600	4,955,600
	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)			
	b	Investments—corporate stock (attach schedule)	22,140,012	20,468,926	35,145,493
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	27,514	3,314	0	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	24,921,981	25,427,840	40,101,093	
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	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	24,921,981	25,427,840	
	30	Total net assets or fund balances (see instructions)	24,921,981	25,427,840	
31	Total liabilities and net assets/fund balances (see instructions) . . .	24,921,981	25,427,840		

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 24,921,981
2	Enter amount from Part I, line 27a	2 505,859
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 25,427,840
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 25,427,840

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table		
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a	See Additional Data Table		
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	1,550,357
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?
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1

Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	1,367,500	35,407,388	0 038622
2012	1,620,500	31,380,638	0 051640
2011	1,346,500	30,440,764	0 044233
2010	1,501,751	27,839,368	0 053943
2009	1,380,196	25,160,987	0 054855

2	Total of line 1, column (d).	2	0 243293
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 048659
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	39,156,831
5	Multiply line 4 by line 3.	5	1,905,332
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	22,729
7	Add lines 5 and 6.	7	1,928,061
8	Enter qualifying distributions from Part XII, line 4.	8	1,767,000

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

Part VI

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	45,457
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	45,457
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	45,457
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	625
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	625
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	259
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ☐	9	45,091
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 2015 estimated tax ☐ Refunded ☐	11	

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	<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>			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ <u>0</u> (2) On foundation managers ☐ \$ <u>0</u>			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ <u>0</u>			
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>	2		No
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>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ NC			
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>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of HIGH POINT BANK TRUST Telephone no (336) 881-3600 Located at 300 N MAIN STREET HIGH POINT NC ZIP+4 27261			
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 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? 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 2014?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years 20 , 20 , 20 , 20 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		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No			
b	If "Yes," did it have excess business holdings in 2014 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 2014.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		☐ 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 4945(d)(4)(A)? (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)?		5b		
Organizations relying on a current notice regarding disaster assistance check here.				☐
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?				☐ Yes ☐ No
If "Yes," attach the statement required by Regulations section 53.4945–5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		☐ Yes ☒ No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		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?		7b		

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
JANET WILSON	PRESIDENT 5 00	0	0	0
411 TREMONT CIRCLE LENOIR, NC 28645				
HENRY WILSON III	DIRECTOR 5 00	0	0	0
4830 SPORTSMAN DRIVE ANCHORAGE, AK 99502				
DAVID WILSON	DIRECTOR 5 00	0	0	0
1016 CLUB COMMONS CIRCLE ATLANTA, GA 30319				
AMY WILSON SCOTT	VICE PRESIDENT 5 00	0	0	0
5945 ARDEN DRIVE CLEMMONS, NC 27012				
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 THE FOUNDATION ONLY MAKES CONTRIBUTIONS TO PRESELECTED CHARITABLE ORGANIZATIONS AND DOES NOT ACCEPT UNSOLICITED REQUESTS FOR FUNDS	0
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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	0

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	34,842,954
b	Average of monthly cash balances.	1b	4,910,174
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	39,753,128
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	39,753,128
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	596,297
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	39,156,831
6	Minimum investment return. Enter 5% of line 5.	6	1,957,842

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	1,957,842
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	45,457
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	45,457
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,912,385
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,912,385
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,912,385

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	1,767,000
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,767,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,767,000
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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				1,912,385
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.	38,763			
c From 2011.				
d From 2012.	64,016			
e From 2013.				
f Total of lines 3a through e.	102,779			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 1,767,000				
a Applied to 2013, 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 2014 distributable amount.				1,767,000
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	102,779			102,779
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				42,606
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

Part XIVPrivate 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 2014, enter the date of the ruling.

b

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

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) 2014	(b) 2013	(c) 2012	(d) 2011	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization 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))

JANET WILSON

b

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

2

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

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

a

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

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,767,000
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Form **990-PF** (2014)

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of				
(1) Cash.		1a(1)		No
(2) Other assets.		1a(2)		No
b Other transactions				
(1) Sales of assets to a noncharitable exempt organization.		1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)		No
(3) Rental of facilities, equipment, or other assets.		1b(3)		No
(4) Reimbursement arrangements.		1b(4)		No
(5) Loans or loan guarantees.		1b(5)		No
(6) Performance of services or membership or fundraising solicitations.		1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c		No
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

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.

Sign Here	*****	2015-05-08	*****	May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name PATRICIA L WALSH	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00012605
	Firm's name ☒ SHARRARD MCGEE & CO PA			Firm's EIN ☒ 56-1146197	
	Firm's address ☒ PO BOX 5869 HIGH POINT, NC 27262			Phone no (336) 884-0410	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
LITIGATION PROCEEDS	P	2013-01-01	2014-12-03
KINDER MORGAN INC	P	2014-11-24	2014-12-31
AIR PRODS & CHEMS INC	P	2004-01-21	2014-04-07
BEAM INC	P	1992-07-15	2014-05-01
KINDER MORGAN ENERGY	P	2009-02-13	2014-11-24
SHADOWLINE INC	P	1976-07-13	2014-09-30
SPDR DJ WILSHIRE REIT	P	2007-02-05	2014-04-07
SPDR DJ WILSHIRE REIT	P	2007-03-01	2014-04-07
VANGUARD INDEX SMALL CAP	P	2009-11-13	2014-04-07
VANGUARD INDEX SMALL CAP	P	2009-11-13	2014-04-07

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
888			888
6		6	0
401,535		175,950	225,585
671,424		425,029	246,395
305,852		152,509	153,343
1,984			1,984
273,649		332,781	-59,132
27,761		32,464	-4,703
1,203,473		562,350	641,123
572,853		267,417	305,436

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			888
			0
			225,585
			246,395
			153,343
			1,984
			-59,132
			-4,703
			641,123
			305,436

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
VECTRUS INC	P	1983-10-20	2014-10-08
VECTRUS INC	P	1983-10-20	2014-10-03
CDK GLOBAL INC	P	2004-09-22	2014-10-07

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
7		4	3
2,771			2,771
36,664			36,664

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			3
			2,771
			36,664

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALEXANDER YOUTH NETWORK 6220 THERMAL RD CHARLOTTE,NC 28211	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
AMERICAN LEGION POST 29 109 CLIFFWOOD DRIVE HUDSON,NC 28638	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
AMERICAN RED CROSS 690 COLISEUM DRIVE WINSTON SALEM,NC 27106	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
ATLANTA CHILDREN'S SHELTER INC 607 PEACHTREE ST NE ATLANTA,GA 30308	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
ATLANTA COMMUNITY FOOD BANK INC 732 JOSPEH E LOWERY BLVD NW ATLANTA,GA 30318	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
ATLANTA MISSION 2353 BOLTON RD ATLANTA,GA 30318	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
BARIUM SPRINGS HOME FOR CHILDREN PO BOX 1 BARIUM SPRINGS,NC 28010	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
BEAN'S CAFE INC 1101 E 3RD AVE ANCHORAGE,AK 99501	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
BLACK MOUNTAIN HOME FOR CHILDREN 80 LAKE EDEN RD BLACK MOUNTAIN,NC 28711	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
BOY SCOUTS OF AMERICA PO BOX 152079 IRVING,TX 75015	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	4,000
BUCKNELL UNIVERSITY ONE DENT DRIVE LEWISBURG,PA 17837	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
CALDWELL COUNCIL ON ADOLESCENT HEALTH 918 WEST AVENUE NW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CALDWELL COUNTY YOLKFELLOW PO BOX 2422 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	60,000
CALDWELL HABITAT FOR HUMANITY PO BOX 1341 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CALDWELL HERITAGE MUSEUM 112 VAIDEN ST LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
Total  3a				1,767,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CALDWELL HOUSE 951 KENHAM PL SW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CALDWELL MEMORIAL HOSPITAL FOUNDATION PO BOX 1890 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	105,500
CARING HOUSE 2625 PICKETT RD DURHAM,NC 27705	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
CDC FOUNDATION 55 PARK PLACE NE STE 400 ATLANTA,GA 30303	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
CHALLENGE ALASKA 3350 COMMERCIAL DRIVE STE 208 ANCHORAGE,AK 99501	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
CHAPEL OF REST PRESERVATION SOCIETY INC 1964 NC HIGHWAY 268 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
CHATTAHOOCHEE RIVERKEEPER INC 916 JOSEPH E LOWERY BLVD NW ATLANTA,GA 30318	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
CHILDREN'S HEALTHCARE OF ATLANTA 1600 TULLIE CIRCLE NE ATLANTA,GA 30329	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
CHILDREN'S MUSEUM OF WINSTON-SALEM 390 S LIBERTY ST WINSTON SALEM,NC 27101	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
CITY OF LENOIR 801 WEST AVENUE NW LENIOR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	30,000
COMMUNITIES IN SCHOOL 2345 CRYSTAL DRIVE SUITE 801 ARLINGTON,VA 22202	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	82,000
CURESEARCH FOR CHILDRENS CANCER 4600 EAST-WEST HIGHWAY BETHESDA,MD 20814	NONE	PUBLIC CHARITY	CHARITABLE CONTRITBUTION	12,500
DANA-FARBER CANCER INSTITUTE 450 BROOKLINE AV BOSTON,MA 022155450	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	100,000
DEERFIELD ACADEMY 1 ALBANY ROAD DEERFIELD,MA 01342	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
DENISON UNIVERSITY 100 WEST COLLEGE GRANVILLE,OH 43023	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
Total 3a				1,767,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
DIAMOND ALUMNI FOUNDATION 2909 W 88TH AVE ANCHORAGE,AK 99502	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
DOCTORS WITHOUT BORDERS PO BOX 5030 HAGERSTOWN,MD 217415030	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
DUKE UNIVERSITY DUKE UNIVERSITY DURHAM,NC 27708	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	101,000
DULATOWN PRESBYTERIAN CHURCH 1537 MILLER HILL RD LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
EDUCATION FOUNDATION INC OF CALDWELL COUNTY 1914 HICKORY BLVD SW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	45,000
EMORY UNIVERSITY-SCHOOL OF LAW 1301 CLIFTON ROAD ATLANTA,GA 30322	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
ENGINEERS WITHOUT BORDERS USA INC 1031 33RD ST STE 210 DENVER,CO 80205	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
EXPLORING JOARA FOUNDATION PO BOX 296 MORGANTON,NC 28680	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
FOOD BANK OF ALASKA 2121 SPAR AVENUE ANCHORAGE,AK 99501	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
FOOTHILLS CONSERVANCY OF NORTH CAROLINA PO BOX 3023 MORGANTON,NC 28680	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
FORT DEFIANCE INC PO BOX 686 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
GEORGIA LEGAL SERVICES PROGRAM INC 104 MARIETTA ST SW STE 250 ATLANTA,GA 303032743	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
GIRDWOOD NORDIC SKI CLUB PO BOX 337 GIRDWOOD,AK 99587	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
GLOBAL HEALTH ACTION INC 1902 CLAIRMONT RD DECATUR,GA 30033	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
GLOBAL HUNGER PROJECT 5 UNION SQUARE WEST 7TH FLOOR NEW YORK,NY 10003	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
Total  3a				1,767,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
GOOD SAMARITAN HEALTH CENTER 239 IVAN ALLEN BLVE NE ATLANTA,GA 30313	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
GRAN TETON NATIONAL PARK FOUNDATION PO BOX 249 MOOSE,WY 83012	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
GRANDFATHER HOME FOR CHILDREN PO BOX 98 BANNER ELK,NC 28604	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
GREAT LAND TRUST 619 E SHIP CREEK AVE ANCHORAGE,AK 99501	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
HABITAT FOR HUMANITY IN ATLANTA INC 519 MEMORIAL DR SE ATLANTA,GA 30312	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
HEIFER PROJECT INTERNATIONAL INC PO BOX 8058 LITTLE ROCK,AR 72203	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
HELPING HANDS CLINIC 501 CAMBRIDGE ST BOSTON,MA 02134	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
HIBRITEN MASONIC LODGE #262 106 N MAIN ST LENIOR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
HOSPICE AND PALLIATIVE CARE CENTER 101 HOSPICE LANE WINSTON SALEM,NC 27103	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
JACKSON HOLE YOUTH BASEBALL LEAGUE PO BOX 3892 JACKSON,WY 830013892	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
JAMES C HARPER SCHOOL OF PERFORMING ARTS PO BOX 390 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	3,000
KANUGA CONFERENCES INC 130 KANUGA CHAPEL DR HENDERSONVILLE,NC 28739	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
KENT PLACE SCHOOL 42 NORWOOD AVENUE SUMMIT,NJ 07902	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
KOINONIA INC 1455 ITALY VALLEY ROAD MIDDLESEX,NY 14507	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
LA LECHE LEAGUE INTERNATIONAL 1400 NORTH MEACHAM RD SCHAUMBURG ATLANTA,GA 30312	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
Total  3a				1,767,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LEES MCRAE COLLEGE ADVANCEMENT OFFICE PO BOX 128 BANNER ELK,NC 28604	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
LENOIR OPTIMIST YOUTH ACTIVITIES INC PO BOX 713 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
LENOIR SOUP KITCHEN 1113 COLLEGE AVE SW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
MULTIPLE MYELOMA RESEARCH FOUNDATION 383 MAIN AVE 5TH FLOOR NORWALK,CT 06851	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUITON	100,000
NATIONAL CENTER FOR MISSING AND EXPLOITED CHILDREN 699 PRINCE ST ALEXANDRIA,VA 22314	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
NATIONAL MUSEUM OF WILDLIFE ART PO BOX 6825 JACKSON HOLE,WY 83002	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	40,000
NATURE CONSERVANCY 4245 N FAIRFIELD DR STE 100 ARLINGTON,VA 22203	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	20,000
NORDIC SKI ASSOCIATION OF ANCHORAGE 205 W 15TH AVE 204 ANCHORAGE,AL 99501	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
NORTH CAROLINA STROKE ASSOCIATION PO BOX 571005 WINSTON SALEM,NC 27157	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	20,000
NORTH CAROLINA WILDLIFE HABITAT FOUNDATION INC PO BOX 29187 GREENSBORO,NC 27429	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
OCEANA INC ATTN DEVELOPMENT DEPT 1350 CONNECTICUT AVE NW 5TH FL WASHINGTON,DC 200361722	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
PARTNERS IN HEALTH PO BOX 996 FREDRICK,MD 217059942	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
PATH PO BOX 900922 SEATTLE,WA 98109	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
PATTERSON SCHOOL FOUNDATION PO BOX 500 PATTERSON,NC 28661	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	100,000
PINGRY CORPORATION 131 MARTINSVILLE RD BASKING RIDGE,NJ 079202709	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
Total  3a				1,767,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PLANNED PARENTHOOD SOUTHEAST INC 75 PIEDMONT AVE STE 800 ATLANTA,GA 30303	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
PROJECT HEALING WATERS FLY FISHING INC PO BOX 695 LA PLATA,MD 20646	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
PROVIDENCE ALASKA FOUNDATION PO BOX 196604 ANCHORAGE,AK 99519	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	25,000
ROBIN'S NEST (CHILDREN'S ADVOCACY CENTER OF CALDWELL COUNTY INC) PO BOX 646 LENIOR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
RURAL HEALTH FOUNDATION OF SUBLETTE COUNTY PO BOX 787 BIG PINEY,WY 83113	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
SAINT JOSEPH'S MERCY FOUNDATION 5673 PEACHTREE DUNWOODY ROAD NE ATLANTA,GA 30342	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
SAMARITAN'S PURSE 801 BAMBOO RD BOONE,NC 28607	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	60,000
SECOND HARVEST FOOD BANK 750 CURTNER AVE SAN JOSE,CA 95125	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
SHELTER HOME OF CALDWELL COUNTY PO BOX 426 LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	35,000
SIT-IN MOVEMENT INC 301 N ELM ST STE 303 GREENSBORO,NC 27401	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
ST JOHN'S MEDICAL CENTER FOUNDATION 625 E BROADWAY JACKSON,WY 83001	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
ST ANDREWS PRESBYTERIAN COLLEGE 1700 DOGWOOD MILE LAURINBURG,NC 28352	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
SUSAN B KOMEN FOUNDATION 5005 LBJ FREEWAY STE 250 DALLAS,TX 75244	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
TETON COUNTY SEARCH & RESCUE VOLUNTEERS PO BOX 1063 JACKSON,WY 83001	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
THE CARTER CENTER 453 FREEDOM PKWY ATLANTA,GA 30307	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
Total ▶ 3a				1,767,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE IXTATAN FOUNDATION PO BOX 1076 CHARLOTTESVILLE,VA 22902	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBTUION	1,000
THE MADERIA SCHOOL INC 8328 GEORGETOWN PIKE MCCLEAN,VA 22102	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
THE WIG BANK 226 MULBERRY ST SW LENOIR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	27,000
UNION PRESBYTRIAN SEMINARY 3401 BROOK ROAD RICHMOND,VA 23227	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
UNITED PRESBYTERIAN CHURCH 415 PENNELL ST NE LENIOR,NC 28645	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	6,500
US FUND FOR UNICEF 1447 PEACHTREE ST NE ATLANTA,GA 30309	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
WAKE FOREST UNIVERSITY HEALTH SCIENCES 1 MEDICAL CENTER BLVD WINSTON SALEM,NC 27157	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBTUION	10,000
WELLESLEY COLLEGE 106 CENTRAL ST WELLESLEY,MA 02481	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
WESTMINSTER SCHOOLS INC 1424 WEST PACES FERRY ROAD NW ATLANTA,GA 30327	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
WOODBERRY FOREST SCHOOL 10 WOODBERRY STATION WOODBERRY FOREST,VA 22989	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	10,000
Total ▶ 3a				1,767,000

TY 2014 Accounting Fees Schedule

Name: THE WILSON FAMILY FOUNDATION

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	1,420	1,420		0

**TY 2014 Investments Corporate
Stock Schedule**

Name: THE WILSON FAMILY FOUNDATION
EIN: 56-2042058

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK INVESTMENTS	20,468,926	35,145,493

TY 2014 Legal Fees Schedule

Name: THE WILSON FAMILY FOUNDATION

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	2,560	2,560		0

TY 2014 Other Assets Schedule

Name: THE WILSON FAMILY FOUNDATION

EIN: 56-2042058

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
C/Y DIVIDENDS RECEIVED IN FOLLOWING YEAR	27,514	3,314	

TY 2014 Other Professional Fees Schedule

Name: THE WILSON FAMILY FOUNDATION

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MANAGEMENT FEES	118,730	118,730		0

TY 2014 Taxes Schedule

Name: THE WILSON FAMILY FOUNDATION

EIN: 56-2042058

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	7,699	7,699		0