

Return of Private Foundation

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

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 Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning

, and ending

Name of foundation THE ROBERT W. WILSON CHARITABLE TRUST		A Employer identification number 51-6536168
Number and street (or P.O. box number if mail is not delivered to street address) R SCHNEIDMAN TTE & ANCHIN, 1375 BWY		B Telephone number 2128403456
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10018		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 256,407,345.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(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		75,734,718.		N/A	
2 Check <input type="checkbox"/> if the foundation is not r					
3 Interest on savings and temporary cash investments		7,283.	7,283.		
4 Dividends and interest from sec		2,762,591.	2,762,591.		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		688,649.			STATEMENT 1
b Gross sales price for all assets on line 6a	96,187,279.				
7 Capital gain net income (from Part IV, line 2)			810,809.		
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)					
11 Other income		-40,122.	-130,010.		STATEMENT 2
12 Total. Add lines 1 through 11		79,153,119.	3,450,673.		
13 Compensation of officers, directors, trustees, etc		807,759.	153,552.		654,207.
14 Other employee salaries and wages		76,649.	38,325.		38,324.
15 Pension plans, employee benefits		7,008.	3,504.		3,504.
16a Legal fees STMT 3		60,990.	0.		60,990.
b Accounting fees STMT 4		217,878.	65,363.		152,515.
c Other professional fees STMT 5		778,196.	778,196.		0.
17 Interest					
18 Taxes STMT 6		138,629.	93,629.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		8,227.	0.		8,227.
22 Printing and publications		197.	0.		197.
23 Other expenses STMT 7		73,819.	67,639.		6,180.
24 Total operating and administrative expenses. Add lines 13 through 23		2,169,352.	1,200,208.		924,144.
25 Contributions, gifts, grants paid		26,251,851.			26,251,851.
26 Total expenses and disbursements. Add lines 24 and 25		28,421,203.	1,200,208.		27,175,995.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		50,731,916.			
b Net investment income (if negative, enter -0-)			2,250,465.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	11,567,412.	14,473,696.	14,473,696.
	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			
	7 Other notes and loans receivable ▶			
	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 STMT 10	25,161,084.	15,434,885.	15,434,885.
	b Investments - corporate stock STMT 11	58,470,169.	127,917,575.	127,917,575.
	c Investments - corporate bonds STMT 12	13,048,585.	18,345,009.	18,345,009.
	11 Investments - land, buildings and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 13	77,200,539.	80,236,075.	80,236,075.	
14 Land, buildings, and equipment, basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ STMT 14)	1,000,000.	105.	105.	
16 Total assets (to be completed by all filers - see the	186,447,789.	256,407,345.	256,407,345.	
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			
	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 ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.			
	24 Unrestricted	186,447,789.	256,407,345.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶			
	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			
	30 Total net assets or fund balances	186,447,789.	256,407,345.	
31 Total liabilities and net assets/fund balances	186,447,789.	256,407,345.		

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	186,447,789.
2 Enter amount from Part I, line 27a	2	50,731,916.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 9	3	19,227,640.
4 Add lines 1, 2, and 3	4	256,407,345.
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	256,407,345.

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Part IV Capital Gains and Losses for Tax on Investment Income SEE ATTACHED STATEMENTS

(a) List and describe the kind(s) of property sold (for example, 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			
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			
b			
c			
d			
e	96,187,279.	95,376,470.	810,809.

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			
b			
c			
d			
e			810,809.

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	810,809.
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). If (loss), enter -0- in Part I, line 8 }	3	N/A

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 doesn't 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))
2016	32,376,329.	188,560,440.	.171703
2015	34,635,350.	194,568,053.	.178011
2014	51,373,835.	58,800,772.	.873693
2013	46,068,614.	51,644,193.	.892039
2012	40,335,207.	40,589,927.	.993725

2 Total of line 1, column (d)	2	3.109171
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.621834
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	232,132,130.
5 Multiply line 4 by line 3	5	144,347,651.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	22,505.
7 Add lines 5 and 6	7	144,370,156.
8 Enter qualifying distributions from Part XII, line 4	8	27,175,995.

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 instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	45,009.
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	45,009.
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	45,009.
6 Credits/Payments:			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a	60,000.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	60,000.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	120,000.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	74,991.	
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax <input type="checkbox"/> 74,991. Refunded <input checked="" type="checkbox"/>	11	0.	

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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the 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
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 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. <u>NY</u>		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the 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

N/A

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
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		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		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>RICHARD SCHNEIDMAN, TRUSTEE</u> Telephone no. ► <u>212-840-3456</u> Located at ► <u>C/O ANCHIN, 1375 BROADWAY, NEW YORK, NY</u> ZIP+4 ► <u>10018</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 15 N/A		
16 At any time during calendar year 2017, 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 FinCEN Form 114. If "Yes," enter the name of the foreign country ►		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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 ► <input type="checkbox"/>		X
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 2017?		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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If "Yes," list the years ► _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2017 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 2017.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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 2017?		X

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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

N/A

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

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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?

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RICHARD SCHNEIDMAN	TRUSTEE			
C/O ANCHIN - 1375 BROADWAY				
NEW YORK, NY 10018	36.00	767,759.	0.	0.
ROBERT FEIDELSON	TRUSTEE			
CO R SCHNEIDMAN-ANCHIN-1375 BROADWAY				
NEW YORK, NY 10018	1.50	20,000.	0.	0.
RONALD ZIMMERMAN	TRUSTEE			
CO R SCHNEIDMAN-ANCHIN-1375 BROADWAY				
NEW YORK, NY 10018	1.50	20,000.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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
ANGELA RICCARDI - CO ANCHIN 1375 BROADWAY, NEW YORK, NY 10018	CONTROLLER			
	36.00	76,649.	19,162.	0.

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

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ATHENA CAPITAL ADVISORS - 55 OLD BEDFORD ROAD, SUITE 302, LINCOLN, MA 01773	INVESTMENT ADVISOR	444,550.
ANCHIN, BLOCK & ANCHIN LLP 1375 BROADWAY, NEW YORK, NY 10018	ACCTG, TAX, CONSULTG	217,878.
LOOMIS, SAYLES & COMPANY, L.P. ONE FINANCIAL CENTER, BOSTON, MA 02111	INVESTMENT ADVISOR	122,167.
BRAVE WARRIOR CAPITAL 12 E. 49TH STREET, NEW YORK, NY 10017	INVESTMENT ADVISOR	103,542.
WELLINGTON TRUST COMPANY, NA 280 CONGRESS STREET, BOSTON, MA 02210	INVESTMENT ADVISOR	69,419.
Total number of others receiving over \$50,000 for professional services		1

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	110,975,038.
b	Average of monthly cash balances	1b	43,453,213.
c	Fair market value of all other assets	1c	81,238,886.
d	Total (add lines 1a, b, and c)	1d	235,667,137.
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	235,667,137.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,535,007.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	232,132,130.
6	Minimum investment return. Enter 5% of line 5	6	11,606,607.

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	11,606,607.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	45,009.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	45,009.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	11,561,598.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	11,561,598.
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	11,561,598.

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	27,175,995.
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	27,175,995.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	27,175,995.

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.

Form 990-PF (2017)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				11,561,598.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012	39,124,826.			
b From 2013	44,269,552.			
c From 2014	50,467,614.			
d From 2015	24,975,780.			
e From 2016	22,980,063.			
f Total of lines 3a through e	181,817,835.			
4 Qualifying distributions for 2017 from Part XII, line 4: \$ 27,175,995.				
a Applied to 2016, 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 2017 distributable amount				11,561,598.
e Remaining amount distributed out of corpus	15,614,397.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	197,432,232.			
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 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				0.
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 2012 not applied on line 5 or line 7	39,124,826.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	158,307,406.			
10 Analysis of line 9:				
a Excess from 2013	44,269,552.			
b Excess from 2014	50,467,614.			
c Excess from 2015	24,975,780.			
d Excess from 2016	22,980,063.			
e Excess from 2017	15,614,397.			

N/A

-

☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]

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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				
ACLU 125 BROAD STREET, 18TH FLOOR NEW YORK, NY 10004		PC	GENERAL SUPPORT	1,200,000.
ADIRONDACK COUNCIL 103 HAND AVE, SUITE 3 ELIZABETHTOWN, NY 12932		PC	GENERAL SUPPORT	250,000.
AMERICAN BIRD CONSERVANCY PO BOX 249 4249 LOUDOUN AVE THE PLAINS, VA 20198		PC	GENERAL SUPPORT	107,423.
AMERICAN FRIENDS OF HEBREW UNIVERSITY ONE BATTERY PARK PLAZA NEW YORK, NY 10004		PC	GENERAL SUPPORT	144,469.
AMERICAN FRIENDS OF PARIS OPERA/BALLET 972 5TH AVENUE, BETWEEN 78 AND 79TH STREET NEW YORK, NY 10075		PC	GENERAL SUPPORT	10,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				26,251,851.
b Approved for future payment				
CENTRAL PARK CONSERVANCY 14 E. 60TH STREET NEW YORK, NY 10022	NONE	PC	GENERAL SUPPORT	2,000,000.
Total ▶ 3b				2,000,000.

THE ROBERT W. WILSON CHARITABLE TRUST

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 BASIS ADJUSTMENT FOR SALE OF DONATED SECURITIES		D	VARIOUS	VARIOUS
b CAPITAL GAIN DIVIDENDS		P	VARIOUS	VARIOUS
c CLASS ACTIONS		P	VARIOUS	VARIOUS
d LTCG FROM ATHENA ALPHA		P	VARIOUS	VARIOUS
e LTCG FROM BOCAGE		P	VARIOUS	VARIOUS
f LTCG FROM PINEHURST		P	VARIOUS	VARIOUS
g LTCG FROM SPECIAL SITUATIONS		P	VARIOUS	VARIOUS
h LTCG FROM WELLINGTON TRUST		P	VARIOUS	VARIOUS
i PUBLICLY TRADED SECURITIES- ATHENA FIDELITY		P	VARIOUS	VARIOUS
j PUBLICLY TRADED SECURITIES- ATHENA FIDELITY SELEC		P	VARIOUS	VARIOUS
k PUBLICLY TRADED SECURITIES-LOOMIS		P	VARIOUS	VARIOUS
l PUBLICLY TRADED SECURITIES-PERSHING		P	VARIOUS	VARIOUS
m SECTION 1256 LOSS FROM WELLINGTON TRUST		P	VARIOUS	VARIOUS
n STCL FROM SPECIAL SITUATIONS		P	VARIOUS	VARIOUS
o STCG FROM WELLINGTON TRUST		P	VARIOUS	VARIOUS

(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		-28,390.	28,390.
b 481,756.			481,756.
c 258.			258.
d 5,000,000.		5,240,802.	-240,802.
e 5,717,440.		6,250,000.	-532,560.
f 3,000,000.		2,812,118.	187,882.
g 277,013.			277,013.
h 392,938.			392,938.
i 3,007,855.		3,167,672.	-159,817.
j 879,373.		740,947.	138,426.
k 73,538,126.		73,599,194.	-61,068.
l 3,671,415.		3,468,501.	202,914.
m		115,389.	-115,389.
n		10,393.	-10,393.
o 221,105.			221,105.

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			28,390.
b			481,756.
c			258.
d			-240,802.
e			-532,560.
f			187,882.
g			277,013.
h			392,938.
i			-159,817.
j			138,426.
k			-61,068.
l			202,914.
m			-115,389.
n			-10,393.
o			221,105.

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

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).
If (loss), enter "-0-" in Part I, line 8

3

THE ROBERT W. WILSON CHARITABLE TRUST

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	WASH SALE DISALLOWANCE	P	VARIOUS	VARIOUS
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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		-156.	156.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(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	
a			156.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	810,809.
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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
AMERICAN RED CROSS 520 WEST 49TH STREET NEW YORK, NY 10019		PC	GENERAL SUPPORT	35,000.
AMHERST COLLEGE PO BOX 5000 AMHERST, MA 01002		PC	GENERAL SUPPORT	200.
ARTS CONNECTION NYC 520 8TH AVENUE, #321 NEW YORK, NY 10018		PC	GENERAL SUPPORT	10,000.
BBB WISE GIVING GUIDE 4200 WILSON BOULEVARD ROOM 800 ARLINGTON, VA 22203		PC	GENERAL SUPPORT	1,000.
BIG BROTHERS BIG SISTERS 40 RECTOR STREET NEW YORK, NY 10006		PC	GENERAL SUPPORT	5,000.
BOTTOMLESS CLOSET 16 EAST 52ND STREET 15TH FLOOR NEW YORK, NY 10022		PC	GENERAL SUPPORT	25,000.
BRIDGE FUND OF NY 271 MADISON AVE, STE 907 NEW YORK, NY 10016		PC	GENERAL SUPPORT	10,000.
BRONX CHILDREN'S MUSEUM PO BOX 1381 NEW YORK, NY 10451		PC	GENERAL SUPPORT	5,000.
BROOKLYN ACADEMY OF MUSIC 30 LAFAYETTE AVENUE BROOKLYN, NY 11217		PC	GENERAL SUPPORT	25,000.
BROOKLYN BOTANIC GARDEN 1000 WASHINGTON AVENUE BROOKLYN, NY 11225		PC	GENERAL SUPPORT	1,000,000.
Total from continuation sheets				24,539,959.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
CATO INSTITUTE 1000 MASSACHUSETTS AVE NW WASHINGTON, DC 20001		PC	GENERAL SUPPORT	7,000.
CENTER FOR COMPETITIVE POLITICS 124 S. WEST STREET, SUITE 201 ALEXANDRIA, VA 22314		PC	GENERAL SUPPORT	90,000.
CENTRAL PARK CONSERVANCY 14 E 60TH ST, 8TH FL NEW YORK, NY 10022		PC	GENERAL SUPPORT	700,000.
CHILDREN'S AID SOCIETY 105 EAST 22ND STREET NEW YORK, NY 10010		PC	GENERAL SUPPORT	15,000.
CHRISTOPHER REEVE PARALYSIS FDT. 636 MORRIS TURNPIKE, SUITE 3A SHORT HILLS, NY 07078		PC	GENERAL SUPPORT	5,000.
CITY HARVEST 575 EIGHTH AVE, 4TH FL NEW YORK, NY 10018		PC	GENERAL SUPPORT	10,000.
COMMENTARY FUND 165 EAST 56TH STREET NEW YORK, NY 10022		PC	GENERAL SUPPORT	3,000.
COMMUNITY CAPITAL NEW YORK 7 WEST CROSS STREET HAWTHORNE, NY 10532		PC	GENERAL SUPPORT	5,000.
CONSERVATION FUND 1655 N. FORT MYER DRIVE, STE 1300 ARLINGTON, VA 22209		PC	GENERAL SUPPORT	6,000.
CORO NY LEADERSHIP CENTER 42 BROADWAY, SUITE 2001 NEW YORK, NY 10004		PC	GENERAL SUPPORT	1,500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
DRUG POLICY ALLIANCE 131 WEST 33RD STREET, 15TH FLOOR NEW YORK, NY 10001		PC	GENERAL SUPPORT	600,000.
DUKE LEMUR CENTER DUKE FOREST, 3705 ERWIN RD DURHAM, NC 27705		PC	GENERAL SUPPORT	10,000.
ENVIRONMENTAL DEFENSE 257 PARK AVE S NEW YORK, NY 10010		PC	GENERAL SUPPORT	1,025,000.
FAIR 1666 CONNECTICUT AVE NW STE #400 WASHINGTON, DC 20009		PC	GENERAL SUPPORT	75,000.
HASTINGS CENTER 21 MALCOLM GORDON ROAD GARRISON, NY 10524		PC	GENERAL SUPPORT	120,000.
HEART PO BOX 738 MAMARONECK, NY 10543		PC	GENERAL SUPPORT	2,500.
HISTORIC DISTRICTS COUNCIL 232 EAST 11TH STREET NEW YORK, NY 10003		PC	GENERAL SUPPORT	500.
HISTORIC HOUSE TRUST THE ARSENAL ROOM 203 NEW YORK, NY 10065		PC	GENERAL SUPPORT	20,000.
HOOR CHILDREN LIC 36-11 12TH ST. LONG ISLAND CITY, NY 11106		PC	GENERAL SUPPORT	10,000.
HUMAN RIGHTS FIRST 75 BROAD STREET, 31ST FLOOR NEW YORK, NY 10004		PC	GENERAL SUPPORT	1,500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
INNER CITY SCHOLARSHIP 1011 FIRST AVE STE 1400 NEW YORK, NY 10022		PC	GENERAL SUPPORT	1,060,000.
INTL. CENTER FOR DISABLED 340 EAST 24TH STREET NEW YORK, NY 10010		PC	GENERAL SUPPORT	10,000.
JAMES BEARD FOUNDATION 167 WEST 12TH STREET NEW YORK, NY 10011		PC	GENERAL SUPPORT	10,000.
LANDMARKS WEST 45 WEST 67TH STREET NEW YORK, NY 10023		PC	GENERAL SUPPORT	1,000.
MANHATTAN CLASS CO. 311 WEST 43RD ST #302 NEW YORK, NY 10036		PC	GENERAL SUPPORT	209,867.
MASS MOCA 1040 MASS MOCA WAY NORTH ADAMS, MA 01247		PC	GENERAL SUPPORT	703,837.
MET OPERA LINCOLN CENTER NEW YORK, NY 10023		PC	GENERAL SUPPORT	225,000.
MOUNT SINAI HOSPITAL ONE GUSTAVE L. LEVY PLACE, BOX 1049 NEW YORK, NY 10029		PC	GENERAL SUPPORT	5,000.
NATIONAL TRUST FOR HISTORIC PRESERVATION 1785 MASSACHUSETTS AVE NW WASHINGTON, DC 20036		PC	GENERAL SUPPORT	4,000,000.
NATURAL AREAS CONSERVANCY 1234 FIFTH AVENUE NEW YORK, NY 10029		PC	GENERAL SUPPORT	659,253.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
NATURE & CULTURE INTL. 1400 MAIDEN LANE DEL MAR, CA 92014		PC	GENERAL SUPPORT	1,000,040.
NATURE CONSERVANCY 4245 N FAIRFAX DR STE 100 ARLINGTON, VA 22203		PC	GENERAL SUPPORT	2,500,000.
NEW MUSEUM OF CONTEMPORARY ART 210 11TH AVE 2ND FL NEW YORK, NY 10001		PC	GENERAL SUPPORT	2,000.
NEW YORK PUBLIC LIBRARY 5TH AVE AT 42ND STREET NEW YORK, NY 10016		PC	GENERAL SUPPORT	4,000,000.
NTHP - RECOGNITION 2600 VIRGINIA AVENUE NW SUITE 1000 WASHINGTON, DC 20037		PC	GENERAL SUPPORT	600.
PARTNERSHIP FOR QUALITY EDUCATION 1011 FIRST AVENUE FL 19 NEW YORK, NY 10022		PC	GENERAL SUPPORT	197,246.
RARE 1840 WILSON BOULEVARD ARLINGTON, VA 22201		PC	GENERAL SUPPORT	3,139,366.
SCENIC HUDSON ONE CIVIC CENTER PLAZA SUITE 200 POUGHKEEPSIE, NY 12601		PC	GENERAL SUPPORT	10,000.
SHELBURNE FARMS 1611 HARBOR ROAD SHELBURNE, VT 05482		PC	GENERAL SUPPORT	10,000.
SPOONS ACROSS AMERICA 630 NINTH AVENUE, SUITE 212 NEW YORK, NY 10036		PC	GENERAL SUPPORT	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
TINNITUS RESEARCH CONSORTIUM 327 GREENBRIAR LANE WEST GROVE, PA 19390		PC	GENERAL SUPPORT	16,800.
UPSTREAM ALLIANCE 1867 LINDAMOR DRIVE ANNAPOLIS, MD 21401		PC	GENERAL SUPPORT	10,000.
VERA INSTITUTE 233 BROADWAY FL 12 NEW YORK, NY 10279 NEW YORK, NY 10279		PC	GENERAL SUPPORT	500,000.
WCPE CLASSICAL RADIO PO BOX 828 WAKE FORREST, NC 27588		PC	GENERAL SUPPORT	500.
WILDLIFE CONSERVATION SOCIETY 2300 SOUTHERN BLVD BRONX, NY 10460		PC	GENERAL SUPPORT	500,000.
WESTCHESTER LAND TRUST 403 HARRIS ROAD BEDFORD HILLS, NY 10507		PC	GENERAL SUPPORT	5,000.
WHITNEY MUSEUM 945 MADISON AVE AT 7TH ST NEW YORK, NY 10021		PC	GENERAL SUPPORT	100,000.
WHOLESOME WAVE 855 MAIN STREET, SUITE 910 BRIDGEPORT, CT 06604		PC	GENERAL SUPPORT	5,000.
WILDERNESS SOCIETY 1615 M STREET, N.W. WASHINGTON, DC 20036		PC	GENERAL SUPPORT	375,000.
WORLD MONUMENTS FUND 95 MADISON AVE FL 9 NEW YORK, NY 10016		PC	GENERAL SUPPORT	1,456,250.
Total from continuation sheets				

Schedule B

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

Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2017

Name of the organization

THE ROBERT W. WILSON CHARITABLE TRUST

Employer identification number

51-6536168

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

THE ROBERT W. WILSON CHARITABLE TRUST

51-6536168

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERT W. WILSON 2002 REVOCABLE TRUST R SCHNEIDMAN TTE & ANCHIN, 1375 BWY NEW YORK, NY 10018	\$ 26,031,593.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	ROBERT W. WILSON 2002 REVOCABLE TRUST R SCHNEIDMAN TTE & ANCHIN, 1375 BWY NEW YORK, NY 10018	\$ 49,703,125.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

THE ROBERT W. WILSON CHARITABLE TRUST**51-6536168****Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	553,259.623 SHS DOUBLELINE TOTALRETBOND	\$ <u>5,964,139.</u>	<u>06/26/17</u>
<u>1</u>	155,000 SHS ISHARES GOLDTRUST	\$ <u>1,855,350.</u>	<u>06/26/17</u>
<u>1</u>	6,280 SHS ALLIANCE DATA	\$ <u>1,645,486.</u>	<u>06/27/17</u>
<u>1</u>	73,656 SHS ANTERO RESOURCES	\$ <u>1,557,456.</u>	<u>06/27/17</u>
<u>1</u>	44,750 FEDHOME LOAN MTG	\$ <u>247,244.</u>	<u>06/27/17</u>
<u>1</u>	53,340 SHS LIBERTY GLOBAL PLC C	\$ <u>1,564,729.</u>	<u>06/27/17</u>

Name of organization	Employer identification number
THE ROBERT W. WILSON CHARITABLE TRUST	51-6536168

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	10,546 SHS QUINTILES/IQVIAHLDGS	\$ 949,773.	06/27/17
<u>1</u>	12,867 SHS SERVICEMASTERGLOBAL	\$ 505,480.	06/27/17
<u>1</u>	206 SHS TRISURA GROUP	\$ 3,284.	06/27/17
<u>1</u>	2,181 SHS AMETEK	\$ 131,994.	06/28/17
<u>1</u>	406 SHS ANSYS	\$ 49,412.	06/28/17
<u>1</u>	529 SHS SMITH A O CORP	\$ 29,857.	06/28/17

Name of organization	Employer identification number
THE ROBERT W. WILSON CHARITABLE TRUST	51-6536168

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	1,208 SHS AMPHENOL	\$ 90,370.	06/28/17
<u>1</u>	1,869 SHS BROOKFIELD ASSET	\$ 74,274.	06/28/17
<u>1</u>	1,743 SHS BRIGHTHORIZONFAMS	\$ 134,577.	06/28/17
<u>1</u>	1,189 SHS BLACKBAUD	\$ 108,009.	06/28/17
<u>1</u>	1,048 SHS BROWN & BROWN	\$ 45,635.	06/28/17
<u>1</u>	289 SHS CINCINNATI FINANCIAL	\$ 20,940.	06/28/17

Name of organization	Employer identification number
THE ROBERT W. WILSON CHARITABLE TRUST	51-6536168

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	830 SHS EXPEDITORS INTL	\$ 46,704.	06/28/17
<u>1</u>	344 SHS FACTSET RESEARCH	\$ 57,899.	06/28/17
<u>1</u>	1,016 SHS FIRST REPUBLIC	\$ 101,956.	06/28/17
<u>1</u>	1,146 SHS HEICO CORP.	\$ 82,970.	06/28/17
<u>1</u>	136 SHS IDEXX LABS	\$ 22,261.	06/28/17
<u>1</u>	4,083 SHS IHS MARKIT	\$ 185,327.	06/28/17

Name of organization

Employer identification number

THE ROBERT W. WILSON CHARITABLE TRUST**51-6536168****Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	1,482 SHS GARTNER INC. _____ _____ _____	\$ <u>183,479.</u>	<u>06/28/17</u>
<u>1</u>	897 SHS MOHAWK INDS _____ _____ _____	\$ <u>218,989.</u>	<u>06/28/17</u>
<u>1</u>	196 SHS METTLERTOLEDO _____ _____ _____	\$ <u>116,310.</u>	<u>06/28/17</u>
<u>1</u>	3,245 SHS PAYCHEX INC. _____ _____ _____	\$ <u>185,874.</u>	<u>06/28/17</u>
<u>1</u>	2,376 SHS PERKINELMER _____ _____ _____	\$ <u>162,198.</u>	<u>06/28/17</u>
<u>1</u>	1,796 SHS ROLLINS INC. _____ _____ _____	\$ <u>73,977.</u>	<u>06/28/17</u>

Name of organization	Employer identification number
THE ROBERT W. WILSON CHARITABLE TRUST	51-6536168

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	99 SHS SHERWIN WILLIAMS	\$ 35,766.	06/28/17
<u>1</u>	3,459 SHS SIGNET JEWELERS	\$ 219,318.	06/28/17
<u>1</u>	5,313 SHS SS&C TECH HOLDINGS	\$ 203,355.	06/28/17
<u>1</u>	251 SHS TRANSDIGM GROUP	\$ 67,026.	06/28/17
<u>1</u>	832 SHS BIO-TECHNE	\$ 98,263.	06/28/17
<u>1</u>	861 SHS TELEFLEX INC.	\$ 178,249.	06/28/17

Name of organization	Employer identification number
THE ROBERT W. WILSON CHARITABLE TRUST	51-6536168

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	1,652 SHS TRIMBLE NAV	\$ 59,555.	06/28/17
<u>1</u>	10 SHS TRISURA GROUP	\$ 157.	06/28/17
<u>1</u>	452 SHS TRACTOR SUPPLY	\$ 24,272.	06/28/17
<u>1</u>	1,524 SHS VANTIV INC. CL A	\$ 95,776.	06/28/17
<u>1</u>	927 SHS WABTEC CORP	\$ 83,143.	06/28/17
<u>1</u>	137 SHS WATERS CORP	\$ 25,274.	06/28/17

Name of organization	Employer identification number
THE ROBERT W. WILSON CHARITABLE TRUST	51-6536168

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
<u>1</u>	925 SHS WHOLE FOODS	\$ <u>39,165.</u>	<u>06/28/17</u>
<u>1</u>	3,011 SHS WILLIAMS SONOMA	\$ <u>147,117.</u>	<u>06/28/17</u>
<u>1</u>	1,359 SHS WEST PHARMACEUTICALS	\$ <u>130,111.</u>	<u>06/28/17</u>
<u>1</u>	176 SHS WATTS WATER TECH	\$ <u>10,991.</u>	<u>06/28/17</u>
<u>1</u>	4,417 SHS DENTSPLY SIRONA	\$ <u>285,979.</u>	<u>06/28/17</u>
<u>1</u>	PRIVATELY HELD PARTNERSHIP INTEREST-SPECIAL SITUATIONS TECHNOLOGY FUND II, L.P.	\$ <u>7,912,123.</u>	<u>07/01/17</u>

Name of organization

Employer identification number

THE ROBERT W. WILSON CHARITABLE TRUST

51-6536168

Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF

LEGAL FEES

STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES IN CONNECTION WITH VARIOUS FOUNDATION MATTERS	60,990.	0.		60,990.
TO FM 990-PF, PG 1, LN 16A	60,990.	0.		60,990.

FORM 990-PF

ACCOUNTING FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING, TAX RETURN PREPARATION, GRANT STRUCTURING/COMPLIANCE &CONSULTING	217,878.	65,363.		152,515.
TO FORM 990-PF, PG 1, LN 16B	217,878.	65,363.		152,515.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	682,339.	682,339.		0.
INVESTMENT MANAGEMENT FEES THROUGH WELLINGTON TRUST	69,419.	69,419.		0.
INVESTMENT CUSTODY FEES	26,438.	26,438.		0.
TO FORM 990-PF, PG 1, LN 16C	778,196.	778,196.		0.

FORM 990-PF

TAXES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX ON NET INVESTMENT INCOME	45,000.	0.		0.
FOREIGN INCOME TAXES WITHHELD THROUGH WELLINGTON TRUST	13,933.	13,933.		0.
FOREIGN INCOME TAXES WITHHELD FROM DIVIDENDS	79,696.	79,696.		0.
TO FORM 990-PF, PG 1, LN 18	138,629.	93,629.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEES	1,500.	0.		1,500.
MISCELLANEOUS EXPENSES	2,538.	0.		2,538.
MISCELLANEOUS PARTNERSHIP EXPENSES THRU WELLINGTON TRUST	37,448.	37,448.		0.
OFFICE EXPENSES	4,284.	2,142.		2,142.
INVESTMENT EXPENSES	28,049.	28,049.		0.
TO FORM 990-PF, PG 1, LN 23	73,819.	67,639.		6,180.

FORM 990-PF	CORPORATE STOCK	STATEMENT 11
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE - CORPORATE STOCK	127,917,575.	127,917,575.
TOTAL TO FORM 990-PF, PART II, LINE 10B	127,917,575.	127,917,575.

FORM 990-PF	CORPORATE BONDS	STATEMENT 12
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE - CORPORATE BONDS	18,345,009.	18,345,009.
TOTAL TO FORM 990-PF, PART II, LINE 10C	18,345,009.	18,345,009.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 13	
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INVTMT IN PSHIP-WELLINGTON TRUST CTF DIVERSIFIED INFLATION HEDGES PORTFOLIO	FMV	10,019,417.	10,019,417.
INVTMT IN ATHENA ALPHA INVESTORS LTD.	FMV	10,148,183.	10,148,183.
INVMT IN GREENLIGHT MASTERS OFFSHORE LTD.	FMV	24,294,983.	24,294,983.
INVMT IN PINEHURST INSTITUTIONAL LTD.	FMV	26,382,800.	26,382,800.
INVMT IN ATHENA SELECT FUND	FMV	2,492,793.	2,492,793.
INVMT IN SPECIAL SITUATIONS TECH II LP	FMV	6,897,899.	6,897,899.
TOTAL TO FORM 990-PF, PART II, LINE 13		80,236,075.	80,236,075.

FORM 990-PF

OTHER ASSETS

STATEMENT 14

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
REDEMPTION RECEIVABLE FROM PINEHURST INSTITUTIONAL LTD.	1,000,000.	0.	0.
OTHER ASSETS	0.	105.	105.
TO FORM 990-PF, PART II, LINE 15	1,000,000.	105.	105.

FORM 990-PF

OTHER REVENUE

STATEMENT 15

DESCRIPTION	BUS CODE	UNRELATED BUSINESS INC	EXCL CODE	EXCLUDED AMOUNT	RELATED OR EXEMPT FUNC- TION INCOME
CURRENCY GAIN			18	28.	0.
PARTNERSHIP INCOME THROUGH WELLINGTON TRUST PARTNERSHIP (LOSS) THROUGH SPECIAL SITUATIONS TECHNOLOGY FUND II L.P.			18	46,908.	0.
PARTNERSHIP (LOSS) THROUGH ATHENA SELECT FUND, LLC			18	-84,785.	0.
			18	-2,273.	0.
TOTAL TO FORM 990-PF, PG 12, LN 11				-40,122.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 9
DESCRIPTION		AMOUNT
UNREALIZED GAINS IN INVESTMENTS CARRIED AT MARKET VALUE		19,227,640.
TOTAL TO FORM 990-PF, PART III, LINE 3		19,227,640.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT 10
DESCRIPTION	U.S. GOV'T OTHER GOV'T	BOOK VALUE FAIR MARKET VALUE
SEE ATTACHED SCHEDULE - US TREASURY BONDS	X	15,434,885. 15,434,885.
TOTAL U.S. GOVERNMENT OBLIGATIONS		15,434,885. 15,434,885.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS		
TOTAL TO FORM 990-PF, PART II, LINE 10A		15,434,885. 15,434,885.