

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		6,288.	5,000.	5,000.
	2	Savings and temporary cash investments		56,047.	88,538.	88,538.
	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				
	b	Investments - corporate stock STMT 5	1,385,392.	1,356,415.	1,863,143.	
	c	Investments - corporate bonds STMT 6	496,237.	496,237.	487,480.	
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment; basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)			1,943,964.	1,946,190.	2,444,161.
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 ▶ ☐				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ ☒				
	27	Capital stock, trust principal, or current funds	1,943,964.	1,946,190.		
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.		
30	Total net assets or fund balances			1,943,964.	1,946,190.	
31	Total liabilities and net assets/fund balances			1,943,964.	1,946,190.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,943,964.
2	Enter amount from Part I, line 27a	2	2,226.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,946,190.
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	1,946,190.

Form 990-PF (2017)

Part IV Capital Gains and Losses for Tax on Investment Income

(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 PUBLICLY TRADED SECURITIES		VARIOUS	VARIOUS
b PUBLICLY TRADED SECURITIES		VARIOUS	VARIOUS
c OW REAL RET FD LIQUID DISTR			
d CAPITAL GAINS DIVIDENDS			
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 89,707.		88,130.	1,577.
b 229,371.		194,436.	34,935.
c 348.			348.
d 69,669.			69,669.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			1,577.
b			34,935.
c			348.
d			69,669.
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	106,529.
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	141,845.	2,270,949.	.062461
2015	142,763.	2,425,636.	.058856
2014	144,350.	2,529,652.	.057063
2013	145,975.	2,436,708.	.059907
2012	164,198.	2,357,722.	.069643

2 Total of line 1, column (d)	2	.307930
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	.061586
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	2,380,865.
5 Multiply line 4 by line 3	5	146,628.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,410.
7 Add lines 5 and 6	7	148,038.
8 Enter qualifying distributions from Part XII, line 4	8	137,750.

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	2,820.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).		3	2,820.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
3 Add lines 1 and 2		5	2,820.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		6a	500.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	0.
6 Credits/Payments.		6c	0.
a 2017 estimated tax payments and 2016 overpayment credited to 2017		6d	0.
b Exempt foreign organizations - tax withheld at source		7	500.
c Tax paid with application for extension of time to file (Form 8868)		8	2.
d Backup withholding erroneously withheld		9	2,322.
7 Total credits and payments. Add lines 6a through 6d		10	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		11	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax ☐ Refunded ☐			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See 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
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 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>DC</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

Form 990-PF (2017)

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>C/O BESSEMER TRUST</u> Telephone no. ► <u>516-508-9623</u> Located at ► <u>630 FIFTH AVENUE, NEW YORK, NY</u> ZIP+4 ► <u>10111</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 <u>N/A</u>		
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?	☐ 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 ► <u>N/A</u>		
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 ► _____	☐ 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.)	<u>N/A</u>	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 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.)	<u>N/A</u>	
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

Form 990-PF (2017)

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

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?

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?

6b

X

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?

N/A

7b

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
IAN K SNOW 655 PARK AVENUE, APT. 3D NEW YORK, NY 10021	TREASURER & SECRETARY 0.00	0.	0.	0.
KENDALL WHEELER 5201 NORWAY DRIVE CHEVY CHASE, MD 20815	PRESIDENT 0.00	0.	0.	0.
FREDERICA JOHNSON 6700 CONNECTICUT AVENUE CHEVY CHASE, MD 20815	CHAIRMAN 0.00	0.	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
NONE				

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

0

Form 990-PF (2017)

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
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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.

Form 990-PF (2017)

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	2,355,495.
b	Average of monthly cash balances	1b	61,627.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,417,122.
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	2,417,122.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	36,257.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,380,865.
6	Minimum investment return. Enter 5% of line 5	6	119,043.

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	119,043.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	2,820.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,820.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	116,223.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	116,223.
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	116,223.

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	137,750.
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	137,750.
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	137,750.

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				116,223.
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	25,311.			
b From 2013	25,485.			
c From 2014	20,550.			
d From 2015	23,169.			
e From 2016	29,108.			
f Total of lines 3a through e	123,623.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$	137,750.			
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				116,223.
e Remaining amount distributed out of corpus	21,527.			
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:	145,150.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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	25,311.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	119,839.			
10 Analysis of line 9.				
a Excess from 2013	25,485.			
b Excess from 2014	20,550.			
c Excess from 2015	23,169.			
d Excess from 2016	29,108.			
e Excess from 2017	21,527.			

N/A

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income**

2017.03040 CHARLOTTE & EDWARD K WHEELE 8G6016 1

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED	N/A	EXEMPT	GENERAL EXEMPT PURPOSE	135,000.
Total			3a	135,000.
b Approved for future payment				
NONE				
Total			3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income	
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1 Program service revenue.							
a _____							
b _____							
c _____							
d _____							
e _____							
f _____							
g Fees and contracts from government agencies							
2 Membership dues and assessments							
3 Interest on savings and temporary cash investments							
4 Dividends and interest from securities				14	39,084.		
5 Net rental income or (loss) from real estate:							
a Debt-financed property							
b Not debt-financed property							
6 Net rental income or (loss) from personal property							
7 Other investment income							
8 Gain or (loss) from sales of assets other than inventory				18	106,529.		
9 Net income or (loss) from special events							
10 Gross profit or (loss) from sales of inventory							
11 Other revenue:							
a _____							
b _____							
c _____							
d _____							
e _____							
12 Subtotal. Add columns (b), (d), and (e)			0.		145,613.	0.	
13 Total. Add line 12, columns (b), (d), and (e)						145,613.	

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (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
N/A		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below? See instr.

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

JULIA M. SETOLA

Preparer's signature

Julia M. Sitola 5/2/18

Date _____

la 5/2/18

Check ☐ if
self-employed

PTIN	
------	--

P00851804

Firm's name ► **BESSEMER TRUST**

Firm's EIN ► 13-2792165

Firm's address ► 630 FIFTH AVENUE
NEW YORK, NY 10111-0333

Phone no. 516-508-9623

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BESSEMER TRUST A/C	108,742.	69,669.	39,073.	39,073.	
ROUNDING ADJUSTMENT	11.	0.	11.	11.	
TO PART I, LINE 4	108,753.	69,669.	39,084.	39,084.	

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FINANCIAL SERVICE FEES	2,750.	0.		2,750.
TO FORM 990-PF, PG 1, LN 16B	2,750.	0.		2,750.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES-BESSEMER TRUST	4,490.	4,490.		0.
TO FORM 990-PF, PG 1, LN 16C	4,490.	4,490.		0.

FORM 990-PF	TAXES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX	130.	130.		0.
FOREIGN TAX W/H IN EXCESS/REFUND	112.	0.		0.
EXCISE TAX BAL DUE	405.	0.		0.
EXCISE TAX ESTIMATES	500.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,147.	130.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED	1,356,415.	1,863,143.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,356,415.	1,863,143.

FORM 990-PF	CORPORATE BONDS	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED	496,237.	487,480.
TOTAL TO FORM 990-PF, PART II, LINE 10C	496,237.	487,480.

C and E Wheeler Foundation		
A/C # 8G6016		
EIN: 52-1503237		
TAX YEAR ENDED: 12/31/17		
Supplemental Schedule of Information		
Part XV, Line 3a, Grants and Contributions Paid During the Year **		
DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
12/04/2017	BIG BROTHERS BIG SISTERS OF PARK COUNTY 105 SOUTH SECOND STREET LIVINGSTON, MT 59047	\$ (100 00)
12/20/2017	BORDERLINKS 620 S 6TH AVENUE TUSCAN, AZ 85701	\$ (250 00)
12/13/2017	BURTON K WHEELER CENTER MONTANA STATE UNIVERSITY PO BOX 170590 BOZEMAN, MT 59717	\$ (10,000 00)
10/31/2017	BURTON K WHEELER CENTER MONTANA STATE UNIVERSITY PO BOX 170590 BOZEMAN, MT 59717	\$ (5,000 00)
12/04/2017	BURTON K WHEELER CENTER MONTANA STATE UNIVERSITY PO BOX 170590 BOZEMAN, MT 59717	\$ (5,000 00)
11/30/2017	BURTON K WHEELER CENTER MS JULIE HANCOCK 1102 SOUTH SIXTH STREET - APT #1 BOZEMAN, MT 5717	\$ (7,000 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
11/29/2017	BYRD HOFFMAN WATER MILL FOUNDATION 115 W 29TH ST, 10TH FLR NEW YORK, NY 10001	\$ (1,500 00)
10/31/2017	CHILDREN'S DIABETES FOUNDATION 4380 S SYRACUSE STREET SUITE 430 DENVER, CO 80237	\$ (2,000 00)
09/18/2017	CHILDREN'S DIABETES FOUNDATION 4380 S SYRACUSE STREET SUITE 430 DENVER, CO 80237	\$ (2,500 00)
04/17/2017	CHILDREN'S DIABETES FOUNDATION 4380 S SYRACUSE STREET SUITE 430 DENVER, CO 80237	\$ (6,000 00)
10/31/2017	DANA-FARBER CANCER INSTITUTE 10 BROOKLINE PLACE WEST - 6TH FLOOR BOSTON,MA 02284-9168	\$ (500.00)
10/31/2017	DARTMOUTH COLLEGE ALUMNI 6066 DEVELOPMENT OFFICE HANOVER, NH 03755	\$ (500.00)
11/29/2017	EVERGLADES PREPARATORY ACADEMY ONE NORTH CLEMATIS STREET SUITE #200 WEST PALM BEACH, FL 33401	\$ (1,000 00)
11/29/2017	FLAGLER MUSEUM WHITE HALL SOCIETY ONE WHITEHALL WAY P O BOX 969 PALM BEACH, FL 33480	\$ (500 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
12/20/2017	FRIENDS OF FRANCIS 33 S LAST CHANCE GULCH HELENA MT 59601	\$ (250 00)
11/29/2017	FRIENDS OF THE ANIMAL SHELTER P O BOX 2207 AIKEN, SC 29802	\$ (250 00)
12/04/2017	FRIENDS OF THE COMMUNITY 1313 WEST GEYSER STREET LIVINGSTON, MT 59047	\$ (100 00)
12/13/2017	GLACIER NATIONAL PARK CONSERVANCY P O BOX 2749 COLUMBIA FALLS, MT 59912	\$ (1,500 00)
11/29/2017	GLACIER NATIONAL PARK CONSERVANCY P O BOX 2749 COLUMBIA FALLS, MT 59912	\$ (2,000 00)
10/31/2017	GLACIER NATIONAL PARK CONSERVANCY P O BOX 2749 COLUMBIA FALLS, MT 59912	\$ (500 00)
11/29/2017	GLACIER NATIONAL PARK CONSERVANCY P O BOX 2749 COLUMBIA FALLS, MT 59912	\$ (2,000 00)
11/29/2017	GLADES ACADEMY FOUNDATION, INC ONE NORTH CLEMATIS STREET, #200 WEST PALM BEACH, FL 33401	\$ (1,000 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
11/29/2017	GREAT OAK 755 TWO NOTCH ROAD AIKEN, SC 29801	\$ (500 00)
11/29/2017	GREEN BOUNDARY FOUNDATION 780 WHISKEY ROAD AIKEN, SC 29801	\$ (500 00)
11/29/2017	GUILD HALL 158 MAIN STREET EAST HAMPTON, NY 11937	\$ (500 00)
11/29/2017	HITCHCOCK WOODS FOUNDATION P O BOX 1702 AIKEN, SC 29802	\$ (500 00)
11/29/2017	HOCKADAY MUSEUM OF ART 302 SECOND AVENUE EAST KALISPELL, MT 59901	\$ (500 00)
10/31/2017	KELLOGG SCHOOL OF MANAGEMENT 2002 SHERIDAN ROAD EVANSTON, IL 60208-0814	\$ (500 00)
12/04/2017	LIVINGSTON ROTARY CLUB P O BOX 66 LIVINGSTON, MT 59047	\$ (100 00)
12/13/2017	LIVINGSTON SISTER CITY PROGRAM P O BOX 1415 LIVINGSTON, MT 59047	\$ (250 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
12/13/2017	LIVINGSTON YOUTH SOCCER ASSOCIATION P.O BOX 556 LIVINGSTON, MT 59047	\$ (5,000 00)
10/31/2017	MADEIRA SCHOOL 8328 GEORGETOWN PIKE MCLEAN, VA 22102	\$ (500 00)
12/04/2017	MCNAIR SKATE PARK 76 KINDSFATHER DRIVE LIVINGSTON, MT 59047-9238	\$ (3,000 00)
11/29/2017	MIDDLEBURY COLLEGE 308 MUNFRORD HOUSE MIDDLEBURY, VT 05753	\$ (500 00)
10/31/2017	MILITARY ORDER OF THE PURPLE HEART PO BOX 281 DENTON, MD 21629	\$ (500 00)
10/31/2017	MONTANA'S OUTDOOR LEGACY FOUNDATION P O BOX 200701 1420 EAST 6TH AVENUE HELENA, MT 59620-0701	\$ (250 00)
10/31/2017	MONTANA'S OUTDOOR LEGACY FND P O BOX 220 COLUMBIA FALLS, MT 59912	\$ (8,000 00)
12/13/2017	MOTHER'S MILK BANK NORTHEAST 377 ELLIOT STREET NEWTON UPPER FALLS, MA 02464	\$ (5,000 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
11/29/2017	MSU RENNE LIBRARY 100 HUNTER HENRY BLVD MISSISSIPPI STATE, MS 39762	\$ (500 00)
10/31/2017	NATIONAL GALLERY OF ART 2000 B SOUTH CLUB DRIVE LANDOVER, MARYLAND 20785	\$ (10,000 00)
10/31/2017	NATIONAL PARK FOUNDATION 1201 EYE STREET NW 550B WASHINGTON, DC 20005	\$ (250 00)
12/28/2017	NATIONAL ROWING FOUNDATION P O BOX 4110 WOBBURN, MA 01888-4110	\$ (10,000 00)
11/29/2017	PALM BEACH DAY ACADEMY 241 SEAVIEW AVENUE PALM BEACH, FL	\$ (2,500 00)
11/29/2017	PALM BEACH DAY ACADEMY 241 SEAVIEW AVENUE PALM BEACH, FL	\$ (2,500 00)
11/29/2017	PALM BEACH DAY ACADEMY 241 SEAVIEW AVENUE PALM BEACH, FL	\$ (1,000 00)
11/29/2017	PALM BEACH ZOO 1301 SUMMIT BOULEVARD WEST PALM BEACH, FL 33405-3035	\$ (1,000 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
11/29/2017	PEGGY ADAMS ANIMAL RESCUE LEAGUE 3100/3200 N MILITARY TRAIL WEST PALM BEACH, FL 33409	\$ (500 00)
10/31/2017	POTOMAC BRIDLE & HIKING TRAIL ASSOCIATION C/O BARBRA JOHNSON 11611 GLEN ROAD POTOMAC, MD 20854	\$ (500 00)
11/29/2017	PRESERVATION FOUNDATION OF PALM BEACH 311 PERUVIAN AVENUE PALM BEACH, FL 33480	\$ (500 00)
11/29/2017	PRESERVATION FOUNDATION OF PALM BEACH 311 PERUVIAN AVENUE PALM BEACH, FL 33480	\$ (500 00)
11/29/2017	SARATOGA WARHORSE FOUNDATION 517 SUMTER STREET, SE AIKEN, SC 29801	\$ (1,000 00)
12/04/2017	SHIFT ENPOWERMENT PROGRAMS PO BOX 193 LIVINGSTON, MT 59047	\$ (100 00)
11/29/2017	SOCIETY OF THE FOUR ARTS 2 FOUR ARTS PLAZA PALM BEACH, FL 33480	\$ (500 00)
11/29/2017	SOCIETY OF THE FOUR ARTS 2 FOUR ARTS PLAZA PALM BEACH, FL 33480	\$ (1,500 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
11/29/2017	SPCA ALBRECHT CENTER FOR ANIMAL WELFARE 199 WILLOW RUN RD AIKEN, SC 29801	\$ (250 00)
11/29/2017	THE BATH AND TENNIS FOUNDATION 1170 S OCEAN BLVD. PALM BEACH, FL 33480	\$ (1,000 00)
11/29/2017	BURTON K WHEELER CENTER MONTANA STATE UNIVERSITY 1102 SOUTH 6TH ST , SUITE #1 BOZEMAN, MT 59715	\$ (7,000 00)
10/31/2017	THE CORAM WEST GLACIER VOLUNTEER FIRE DEPARTMENT P O BOX 162 WEST GLACIER, MT 59936	\$ (250 00)
11/29/2017	THE CORAM WEST GLACIER VOLUNTEER FIRE DEPARTMENT P O BOX 162 WEST GLACIER, MT 59936	\$ (500 00)
12/13/2017	THE GLACIER INSTITUTE P O BOX 1887 KALISPELL, MT. 59903	\$ (500 00)
12/13/2017	THE LIVINGSTON FOOD PANTRY 202 S 2ND STREET LIVINGSTON, MT 59047	\$ (500 00)
11/29/2017	THE NATURE CONSERVANCY - LONG ISLAND CHAPTER 250 LAWRENCE HILL ROAD COLD SPRING HARBOR, NY 11976	\$ (500 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750 00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
10/31/2017	THE POWELL COUNTY MUSEUM & ARTS FOUNDATION INC 1106 MAIN STREET DEER LODGE, MT 59722	\$ (500 00)
12/13/2017	THE ROXY THEATER BETWEEN THE LINES THEATRE 718 S HIGGINS AVENUE MISSOULA, MT 59801	\$ (1,000 00)
12/04/2017	THE ROXY THEATER BETWEEN THE LINES THEATRE 718 S HIGGINS AVENUE MISSOULA, MT 59801	\$ (200 00)
12/13/2017	THE SHANE LALANI CENTER FOR THE ARTS P O BOX 58 LIVINGSTON, MT. 59047	\$ (250 00)
12/04/2017	THE SHANE LALANI CENTER FOR THE ARTS P O BOX 58 LIVINGSTON, MT 59047	\$ (6,380 00)
12/13/2017	THE WESTERN PEOPLE AND PLACES INITIATIVE C/O DR NICOL RAE MONTANA STATE UNIVERSITY 1102 SOUTH 6TH ST BOZEMAN, MT 59715	\$ (500 00)
10/31/2017	VASSAR COLLEGE BOX 725 124 RAYMOND AVENUE POUGHKEEPSIE, NY 12604	\$ (500 00)
12/04/2017	YELLOWSTONE BALLET SCHOOL 109 SOUTH B STREET LIVINGSTON, MT 59047	\$ (5,000 00)

DATE	CHARITABLE GIFTS TO DONEES	Amount
10/31/2017	ACE SCHOLARSHIPS COLORADO 1201 EAST COLFAX AVENUE SUITE 302 DENVER, CO 80218	\$ (750.00)
10/31/2017	ACE SCHOLARSHIPS MONTANA P O. BOX 11707 BOZEMAN, MT 59719	\$ (500 00)
12/04/2017	AMERICAN LEGION OSCAR H COWAN POST #3 PO BOX 1456 STAMFORD, CT 06904	\$ (20 00)
11/29/2017	ARCHBOLD BIOLOGICAL STATION 123 MAIN DRIVE VENUS, FL 33960	\$ (500 00)
	TOTAL	\$ (135,000.00)
**Contributions are made to these organizations to assist them in carrying out those activities for which they have been granted tax exempt status.		