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DLN: 93491130013299

2018

OMB No 1545-0052

Return of Private Foundation

Department of the Treasury Internal Revenue Service

Form 990-PF

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

Do not enter social security numbers on this form as it may be made public.
 Go to <u>www.irs.gov/Form990PF</u> for instructions and the latest information.

Open to Public Inspection

		ndar year 2018, or tax year beginning 01-01-20	18 , a	nd er	nding 12-31-		
C.	James a	indation ndrary Lou Wilson Truck Inc.			35-2129418	entification numbe	r
		Trust Inc	I Daniel de la contra		35-2129418		
		l street (or P O box number if mail is not delivered to street address) ntern Road	Room/suite		,	mber (see instructior	ıs)
City	or town	, state or province, country, and ZIP or foreign postal code			(317) 773-2190)	
	ers, IN				C If exemption	application is pending	g, check here
G Cł	neck al	l that apply 🔲 Initial return 🔲 Initial return of a	former public charity		D 1. Foreign or	ganızatıons, check he	re
		☐ Final return ☐ Amended return				ganizations meeting k here and attach coi	
		Address change Name change			•	undation status was t	· -
		pe of organization Section 501(c)(3) exempt private to				n 507(b)(1)(A), chec	
		4947(a)(1) nonexempt charitable trust Other taxable (et value of all assets at end J Accounting method	Private foundation Cash		E If the founds	ation is in a 60-month	termination
of	year (f	rom Part II, col (c), \$\Displays \frac{139,897}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \frac{1}{2} \		ıaı		n 507(b)(1)(B), chec	
Pa	rt I	Analysis of Revenue and Expenses (The total	(a) Revenue and				(d) Disbursements
		of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions)	expenses per books	(b)	Net investment income	(c) Adjusted net income	for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc , received (attach					
	_	schedule) Check ▶ ☑ If the foundation is not required to attach					
	2	Sch B					
	3	Interest on savings and temporary cash investments	1,814		1,814	1,814	
	4	Dividends and interest from securities	4,096	'	4,096	4,096	
	5a b	Gross rents Net rental income or (loss)					
Revenue	6a	Net gain or (loss) from sale of assets not on line 10	379				
	Ь	Gross sales price for all assets on line 6a 16,000					
	7	Capital gain net income (from Part IV, line 2)			967		
	8	Net short-term capital gain					
	9	Income modifications					
	10a	Gross sales less returns and allowances Less Cost of goods sold					
	Ь	Gross profit or (loss) (attach schedule)					
	11	Other income (attach schedule)					
	12	Total. Add lines 1 through 11	6,289		6,877	5,910	
	13	Compensation of officers, directors, trustees, etc					
	14	Other employee salaries and wages					
es	15	Pension plans, employee benefits					
ens	16a	Legal fees (attach schedule)	800	ļ	800	800	800
Administrative Expenses	b	Accounting fees (attach schedule)	9 825		825	825	825
ve_	C .	Other professional fees (attach schedule)					
ratı	17 18	Interest	9 3 35		35	35	35
Z I	19	Depreciation (attach schedule) and depletion					
Ē	20	Occupancy					
Ă	21	Travel, conferences, and meetings					
an	22	Printing and publications					
Operating and	23	Other expenses (attach schedule)					
rat	24	Total operating and administrative expenses.					
<u>8</u>	25	Add lines 13 through 23	1,660	ļ	1,660	1,660	1,660
_	25	Contributions, gifts, grants paid	4,900				4,900
	26	Total expenses and disbursements. Add lines 24 and 25	6,560		1,660	1,660	6,560
	27	Subtract line 26 from line 12					
	a	Excess of revenue over expenses and disbursements	-271				
	ь	Net investment income (if negative, enter -0-)			5,217		
	С	Adjusted net income (if negative, enter -0-)				4,250	
-or	Paper	work Reduction Act Notice, see instructions.			Cat No 11289	(For	m 990-PF (2018

37,481

35,605

74,239

74,239

74,239

74,239

33,951

36,000

73,968

73,968

73,968

73,968

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74,239

73,968

73,968 Form 990-PF (2018)

-271

99,873

36,007

139,897

Assets 10a 11

9

b

C

12

13

14

15 16

17

18

19

20

21 22

23

24

25

26

28

29

31 Part III

Liabilities

Balances

Fund

ö

Assets 27

Net 30

2

Prepaid expenses and deferred charges

Investments—land, buildings, and equipment basis ▶ _

Less accumulated depreciation (attach schedule) ▶

Less accumulated depreciation (attach schedule) ▶

Total assets (to be completed by all filers—see the

Foundations that follow SFAS 117, check here ▶

and complete lines 24 through 26 and lines 30 and 31.

Foundations that do not follow SFAS 117, check here ▶

Paid-in or capital surplus, or land, bldg, and equipment fund

Retained earnings, accumulated income, endowment, or other funds

Total net assets or fund balances (see instructions)

Total liabilities and net assets/fund balances (see instructions) .

Analysis of Changes in Net Assets or Fund Balances

Total net assets or fund balances at beginning of year-Part II, column (a), line 30 (must agree with end-

Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30

Land, buildings, and equipment basis ▶

instructions Also, see page 1, item I)

Other assets (describe > _

Other liabilities (describe ▶_

Grants payable

Unrestricted

Temporarily restricted

Permanently restricted

and complete lines 27 through 31.

of-year figure reported on prior year's return)

Decreases not included in line 2 (itemize) ▶

Enter amount from Part I, line 27a

Other increases not included in line 2 (itemize) ▶ _____

Investments—U S and state government obligations (attach schedule)

Investments—corporate stock (attach schedule) Investments—corporate bonds (attach schedule)

Loans from officers, directors, trustees, and other disqualified persons

Mortgages and other notes payable (attach schedule).

Total liabilities(add lines 17 through 22)

					Page
(a) list and describe the	Losses for Tax on Investmen	t Income			
	e kınd(s) of property sold (e g , real e nuse, or common stock, 200 shs MLC		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a					
	(f)	I	(g)	(h)
(e) Gross sales price	Depreciation allowed (or allowable)	Cost or	other basis ense of sale	Gain o	or (loss)) minus (g)
 a	(or allowable)	plus exp	erise or sale	(e) plus (i) Illilius (g)
b					
3					
Complete only for assets sho		y the foundation	on 12/31/69	,	'1\
	(j)		(k)	Gains (Col ((I) h) gain minus
(i)	Adulsted basis	Fyress	of col (1)	col (k), but not	less than -0-1 or
· ·					
other conditions, complete item	ms 2a, b, c, and d See instructions				
	ns 2a, b, c, and d See instructions none number or email address of the p	person to whom a	applications should	be addressed	

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	1	Cash—non-interest-bearing	1,153	4,017	4,017
	2	Savings and temporary cash investments			
	3	Accounts receivable			
	١.	Less allowance for doubtful accounts ▶			
	4	Pledges receivable ► Less allowance for doubtful accounts ►		l	
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	-	disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule)			
		Less allowance for doubtful accounts ▶			
2	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
As	10a	Investments—U S and state government obligations (attach schedule)			
	ь	Investments—corporate stock (attach schedule)	37,481	33,951	99,873

	990-PF (20	,		F	age 6
Pai	rt VII-B	Statements Regarding Activities for Which Form 4720 May Be Require	d (continued)		
5a	(1) Carry (2) Influe	year did the foundation pay or incur any amount to on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Ince the outcome of any specific public election (see section 4955), or to carry ectly or indirectly, any voter registration drive?	☐ Yes ☑ No	Yes	No
	(3) Provid (4) Provid	e a grant to an individual for travel, study, or other similar purposes? e a grant to an organization other than a charitable, etc , organization described	Yes V No		
	(5) Provid	on 4945(d)(4)(A)? See instructions	☐ Yes ☑ No		
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Part VIII Information About Officers, Directors, Trustees, Foundary and Contractors (continued)	oundation Managers, Highly Pa	aid Employees,
3 Five highest-paid independent contractors for professional services	(see instructions). If none, enter	"NONE".
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		•
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year Include releva organizations and other beneficiaries served, conferences convened, research papers produce:		r of Expenses
1		
2		
3		
<u> </u>		
4		
Part IX-B Summary of Program-Related Investments (see ins	tructions)	
Describe the two largest program-related investments made by the foundation during the	ax year on lines 1 and 2	Amount
1		
2		
All other program-related investments See instructions		
3		
Total. Add lines 1 through 3		•
Iotal. Add lines 1 through 3		Form 990-PF (2018)

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for

3a 3b

4

5

6.560

6,508

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52

Amounts set aside for specific charitable projects that satisfy the

the section 4940(e) reduction of tax in those years

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

3

4

5

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Part XIII	Und

From 2013. .

b From 2014. . c From 2015.

d From 2016. .

e From 2017. . . .

2

3

orm 990-PF (2018)				Page	9
Part XIII Undistributed Income (see instruc	tions)				
	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018	
1 Distributable amount for 2018 from Part XI, line 7					0
2 Undistributed income, if any, as of the end of 2018					
a Enter amount for 2017 only					
b Total for prior years 20					
3 Excess distributions carryover, if any, to 2018					

53.425

6.560

59,985

30.425

29,560

30.425 2,750 7.250 7.000 6,000

f Total of lines 3a through e. 4 Qualifying distributions for 2018 from Part XII, line 4 🕨 \$

2.750 7,250

7.000

6.000

6.560

same amount must be shown in column (a)) 6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5

required—see instructions). (If an amount appears in column (d), the

(Election required—see instructions).

a Applied to 2017, but not more than line 2a

b Applied to undistributed income of prior years c Treated as distributions out of corpus (Election **d** Applied to 2018 distributable amount. . .

e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2018

b Prior years' undistributed income Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. d Subtract line 6c from line 6b Taxable amount e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see f Undistributed income for 2018 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019 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) 8 Excess distributions carryover from 2013 not

applied on line 5 or line 7 (see instructions) . . .

9 Excess distributions carryover to 2019.

10 Analysis of line 9 a Excess from 2014.

b Excess from 2015. .

c Excess from 2016. .

d Excess from 2017. .

e Excess from 2018. .

Subtract lines 7 and 8 from line 6a

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	Part XIV Private Operating Found	l ations (see ınstr	uctions and Part '	VII-A, question 9)		
1a	If the foundation has received a ruling or de foundation, and the ruling is effective for 20			erating		
b	Check box to indicate whether the organizat	ion is a private oper	rating foundation de	scribed in section $ \Box $	ີ່ 4942(ງ)(3) or □] 4942(J)(5)
2a	Enter the lesser of the adjusted net					(e) Total
	income from Part I or the minimum investment return from Part X for each year listed	(a) 2018	(b) 2017	(c) 2016	(d) 2015	(c) rotal
b	85% of line 2a					
С	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
а	"Assets" alternative test—enter					
	(1) Value of all assets					
b	under section 4942(j)(3)(B)(i) "Endowment" alternative test— enter 2/3 of minimum investment return shown in					
	Part X, line 6 for each year listed					
С	"Support" alternative test—enter (1) Total support other than gross					
	investment income (interest, dividends, rents, payments on securities loans (section					
	512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt					
	organizations as provided in section 4942(j)(3)(B)(III)					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income	(0 1 : 11 :		6 1 1	 	<u> </u>
Pa	Supplementary Information assets at any time during th			toundation had	\$5,000 or more	ın
1 a	Information Regarding Foundation Man List any managers of the foundation who have	agers:	•	al contributions recei	ved by the foundatio	n
_	before the close of any tax year (but only if					
	List any managers of the foundation who ow ownership of a partnership or other entity) Information Regarding Contribution, Gr	of which the founda	tion has a 10% or g	reater interest	arge portion of the	
.	Check here ▶ ☑ If the foundation only mak	es contributions to	preselected charitab	ole organizations and	does not accept	
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	Total net assets or fund balances at beginn	ing of year—Part II	, column (a), line 30) (must agree with e	nd-	
	of-year figure reported on prior year's retu					74,239

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b Approved for future payment

Enter gros	s amounts unless otherwise indicated	Unrelated bu	usiness income	Excluded by section	512, 513, or 514	(e) Related or exempt
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	function income (See instructions)
2 Memb 3 Intere	and contracts from government agencies ership dues and assessments. st on savings and temporary cash ments					
4 Divide	ands and interest from securities					1,81 ² 4,096
	:-financed property					
	debt-financed property					
	ntal income or (loss) from personal property investment income.					
	or (loss) from sales of assets other than					
ınvent	ory					379
	come or (loss) from special events					
	profit or (loss) from sales of inventory revenue a					
	revenue a					
с						
	hall Add ashroom (IA) (A) and (A)					
	tal Add columns (b), (d), and (e) . Add line 12, columns (b), (d), and (e)				3	6,289
(See w	vorksheet in line 13 instructions to verify calcu	ılatıons)				0,203
Line No. ▼	Explain below how each activity for which the accomplishment of the foundation's explain tructions)	income is report	ed ın column (e) d	of Part XVI-A contribu		0

. ,	7
_	Information Regarding Transfers To and Transactions and Relationships With Noncharitable
11	Exempt Organizations

Pai	rt XVI		Exempt Organi	zations				·			
1 D	d the o	organ er tha		directly engage in	any of the	following with 527, relating to	any other o political org	rganization described in section 501 ganizations?		Yes	No
			n the reporting foun	- ,			•				
(:	L) Cas	h.							1a(1)		No
(2	2) Oth	er as	sets						1a(2)		No
ЬО	ther tra	ansac	tions								
	-		assets to a nonchar						1b(1)	1	No
-	-		es of assets from a r						1b(2)	_	No
•	-		f facilities, equipmer	•					1b(3)	_	No
•	-		sement arrangemen · loan guarantees.						1b(4)	_	No No
									1b(5)	_	No
•	-			·	_				1c	+	No
	_			-	-			should always show the fair market		1	
of	the go	ods,	other assets, or ser	vices given by the	reporting f	foundation If the	ne foundatio	on received less than fair market valu			
ın	any tr	ansa	ction or sharing arra	ngement, show in	column (d) the value of t	ne goods, d	other assets, or services received			
(a) Li	ne No	(E) Amount involved	(c) Name of noncha	arıtable exer	mpt organization	(d) Des	scription of transfers, transactions, and sha	iring arra	angemer	nts
2a Is	the fo	unda	tion directly or indire	ectly affiliated with	, or related	d to, one or mo	re tax-exen	npt organizations			
de	escribe	d ın s	section 501(c) (other	than section 501(c)(3)) or ı	n section 527?		Yes	✓ No		
b If	"Yes,"	com	plete the following s	chedule							
		1	(a) Name of organization	on	(b) Type of organiz	ation	(c) Description of relati	onship		
								companying schedules and statemer rer (other than taxpayer) is based on			
	wh		reparer has any kno		and comp	Deciaration	л от ргераг	er (other than taxpayer) is based on	an inio	iiiiatioi	1 01
Sig						2019-05-10			he IRS d	liscuss th	าเร
Her	e 👠					2019-05-10	\ .	returi with t	n :he prepa	arer show	wn
		Sidi	nature of officer or t	rustee		Date	/ .	Title			_
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TY 2018 Accounting Fees Schedule										
	Name:	C James	and Mary Lou W	/ilson						
		Charitabl	e Trust Inc							
	EIN:	35-2129	418							
Softv	vare ID:	1800721	8							
Software \	Version:	2018v3.1	L							
Category	ount	Net Investment	nt	Adjusted Net Income	Disbursements for Charitable Purposes					
		825		825	825	825				

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TY 2018 Legal Fees Schedu	ıle	_	_			
Nan	ne: C James and	C James and Mary Lou Wilson				
	Charitable T	Charitable Trust Inc				
EIN: 35-2129418						
Software :	ID: 18007218					
Software Version: 2018v3.1						
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes		
Legal	800	800	800	800		

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TY 2018 Taxes Schedule							
Name:		C James and Charitable T	d Mary Lou Wilson rust Inc				
	35-2129418						
Software ID:		18007218					
Software	Version:	2018v3.1					
Category	Amount		Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes		
Taxes		35	35	35	35		