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Form **990-PF****Return of Private Foundation**

OMB No 1545-0052

**2018**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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

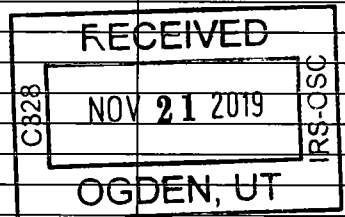
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Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

For calendar year 2018 or tax year beginning , 2018, and ending , 20

|                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                             |                                                                                                                                                                             |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of foundation<br><b>THE HUEY &amp; ANGELINA WILSON FOUNDATION</b>                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                             | A Employer identification number<br><b>58-1714586</b>                                                                                                                       |
| Number and street (or P O box number if mail is not delivered to street address)                                                                                                                                                                                       | Room/suite                                                                                                                                                                                                                                                                  | B Telephone number (see instructions)                                                                                                                                       |
| <b>3636 SOUTH SHERWOOD FOREST BLVD.</b>                                                                                                                                                                                                                                | <b>650</b>                                                                                                                                                                                                                                                                  | <b>(225) 292-1344</b>                                                                                                                                                       |
| City or town, state or province, country, and ZIP or foreign postal code<br><b>BATON ROUGE, LA 70816</b>                                                                                                                                                               |                                                                                                                                                                                                                                                                             | C If exemption application is pending, check here. <input type="checkbox"/>                                                                                                 |
| G Check all that apply                                                                                                                                                                                                                                                 | Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/><br>Final return <input type="checkbox"/> Amended return <input type="checkbox"/><br>Address change <input type="checkbox"/> Name change <input type="checkbox"/> | D 1 Foreign organizations, check here. <input type="checkbox"/><br>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 <input type="checkbox"/> | J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____                                                                                                                                | 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) <b>\$ 133,119,856.</b>                                                                                                                                                               | (Part I, column (d) must be on cash basis)                                                                                                                                                                                                                                  | 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) (see instructions)) |                                                                                    | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| 1                                                                                                                                                                  | Contributions, gifts, grants, etc., received (attach schedule)                     |                                    |                           |                         |                                                             |
| 2                                                                                                                                                                  | Check <input type="checkbox"/> if the foundation is not required to attach Sch. B. |                                    |                           |                         |                                                             |
| 3                                                                                                                                                                  | Interest on savings and temporary cash investments                                 | 155,962.                           | 153,230.                  |                         |                                                             |
| 4                                                                                                                                                                  | Dividends and interest from securities                                             | 1,488,062.                         | 1,519,338.                |                         |                                                             |
| 5a                                                                                                                                                                 | Gross rents                                                                        |                                    |                           |                         |                                                             |
| b                                                                                                                                                                  | Net rental income or (loss)                                                        |                                    |                           |                         |                                                             |
| 6a                                                                                                                                                                 | Net gain or (loss) from sale of assets not on line 10                              | 11,096,050.                        |                           |                         |                                                             |
| b                                                                                                                                                                  | Gross sales price for all assets on line 6a                                        | 141,853,831.                       |                           |                         |                                                             |
| 7                                                                                                                                                                  | Capital gain net income (from Part IV, line 2)                                     |                                    | 11,153,569.               |                         |                                                             |
| 8                                                                                                                                                                  | Net short-term capital gain                                                        |                                    |                           |                         |                                                             |
| 9                                                                                                                                                                  | Income modifications                                                               |                                    |                           |                         |                                                             |
| 10a                                                                                                                                                                | Gross sales less returns and allowances                                            |                                    |                           |                         |                                                             |
| b                                                                                                                                                                  | Less Cost of goods sold                                                            |                                    |                           |                         |                                                             |
| c                                                                                                                                                                  | Gross profit or (loss) (attach schedule)                                           |                                    |                           |                         |                                                             |
| 11                                                                                                                                                                 | Other income (attach schedule) <b>ATCH 1</b>                                       | -214,676.                          | 3,070,114.                |                         |                                                             |
| 12                                                                                                                                                                 | Total. Add lines 1 through 11                                                      | 12,525,398.                        | 15,896,251.               |                         |                                                             |
| 13                                                                                                                                                                 | Compensation of officers, directors, trustees, etc.                                | 382,311.                           | 47,092.                   |                         | 278,128.                                                    |
| 14                                                                                                                                                                 | Other employee salaries and wages                                                  | 336,416.                           | 11,540.                   |                         | 286,122.                                                    |
| 15                                                                                                                                                                 | Pension plans, employee benefits                                                   |                                    |                           |                         |                                                             |
| 16a                                                                                                                                                                | Legal fees (attach schedule)                                                       |                                    |                           |                         |                                                             |
| b                                                                                                                                                                  | Accounting fees (attach schedule)                                                  | 111,686.                           | 83,765.                   |                         | 27,921.                                                     |
| c                                                                                                                                                                  | Other professional fees (attach schedule) <b>[2]</b>                               | 864,693.                           | 859,248.                  |                         | 5,445.                                                      |
| 17                                                                                                                                                                 | Interest                                                                           |                                    |                           |                         |                                                             |
| 18                                                                                                                                                                 | Taxes (attach schedule) (see instructions) <b>[3]</b>                              | 6,894.                             | 11,557.                   |                         |                                                             |
| 19                                                                                                                                                                 | Depreciation (attach schedule) and depletion                                       |                                    |                           |                         |                                                             |
| 20                                                                                                                                                                 | Occupancy                                                                          |                                    |                           |                         |                                                             |
| 21                                                                                                                                                                 | Travel, conferences, and meetings                                                  |                                    |                           |                         |                                                             |
| 22                                                                                                                                                                 | Printing and publications                                                          |                                    |                           |                         |                                                             |
| 23                                                                                                                                                                 | Other expenses (attach schedule) <b>ATCH 4</b>                                     | 93,020.                            | 1,236.                    |                         | 83,303.                                                     |
| 24                                                                                                                                                                 | Total operating and administrative expenses. Add lines 13 through 23               | 1,795,020.                         | 1,014,438.                |                         | 680,919.                                                    |
| 25                                                                                                                                                                 | Contributions, gifts, grants paid                                                  | 5,775,450.                         |                           |                         | 5,775,450.                                                  |
| 26                                                                                                                                                                 | Total expenses and disbursements. Add lines 24 and 25                              | 7,570,470.                         | 1,014,438.                | 0.                      | 6,456,369.                                                  |
| 27                                                                                                                                                                 | Subtract line 26 from line 12                                                      |                                    |                           |                         |                                                             |
| a                                                                                                                                                                  | Excess of revenue over expenses and disbursements                                  | 4,954,928.                         |                           |                         |                                                             |
| b                                                                                                                                                                  | Net investment income (if negative, enter -0-)                                     |                                    | 14,881,813.               |                         |                                                             |
| c                                                                                                                                                                  | Adjusted net income (if negative, enter -0-)                                       |                                    |                           |                         |                                                             |



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| Part II Balance Sheets      |                                                                                                                                        | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)                |              | Beginning of year | End of year    |                       |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------|-------------------|----------------|-----------------------|
|                             |                                                                                                                                        |                                                                                                                                   |              | (a) Book Value    | (b) Book Value | (c) Fair Market Value |
| Assets                      | 1                                                                                                                                      | Cash - non-interest-bearing . . . . .                                                                                             |              | 2,625,015.        | 2,862,199.     | 2,862,199.            |
|                             | 2                                                                                                                                      | Savings and temporary cash investments . . . . .                                                                                  |              |                   |                |                       |
|                             | 3                                                                                                                                      | Accounts receivable ▶ . . . . .                                                                                                   |              |                   |                |                       |
|                             |                                                                                                                                        | Less: allowance for doubtful accounts ▶ . . . . .                                                                                 |              |                   |                |                       |
|                             | 4                                                                                                                                      | Pledges receivable ▶ . . . . .                                                                                                    |              |                   |                |                       |
|                             |                                                                                                                                        | Less: allowance for doubtful accounts ▶ . . . . .                                                                                 |              |                   |                |                       |
|                             | 5                                                                                                                                      | Grants receivable . . . . .                                                                                                       |              |                   |                |                       |
|                             | 6                                                                                                                                      | Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . . |              |                   |                |                       |
|                             | 7                                                                                                                                      | Other notes and loans receivable (attach schedule) ▶ . . . . .                                                                    |              |                   |                |                       |
|                             |                                                                                                                                        | Less: allowance for doubtful accounts ▶ . . . . .                                                                                 |              |                   |                |                       |
|                             | 8                                                                                                                                      | Inventories for sale or use . . . . .                                                                                             |              |                   |                |                       |
|                             | 9                                                                                                                                      | Prepaid expenses and deferred charges . . . . . ATCH 5                                                                            |              |                   | 5,233,933.     | 5,233,933.            |
|                             | 10a                                                                                                                                    | Investments - U S and state government obligations (attach schedule) . . . . .                                                    |              |                   |                |                       |
|                             | b                                                                                                                                      | Investments - corporate stock (attach schedule) ATCH 6 . . . . .                                                                  |              | 27,364,850.       | 107,536,054.   | 98,169,351.           |
|                             | c                                                                                                                                      | Investments - corporate bonds (attach schedule) . . . . .                                                                         |              |                   |                |                       |
|                             | 11                                                                                                                                     | Investments - land, buildings, and equipment basis ▶ . . . . .                                                                    |              |                   |                |                       |
|                             | Less: accumulated depreciation ▶ (attach schedule) . . . . .                                                                           |                                                                                                                                   |              |                   |                |                       |
| 12                          | Investments - mortgage loans . . . . .                                                                                                 |                                                                                                                                   |              |                   |                |                       |
| 13                          | Investments - other (attach schedule) . . . . . ATCH 7 . . . . .                                                                       |                                                                                                                                   | 108,086,471. | 24,679,687.       | 23,969,588.    |                       |
| 14                          | Land, buildings, and equipment basis ▶ . . . . .                                                                                       |                                                                                                                                   |              |                   |                |                       |
|                             | Less: accumulated depreciation ▶ (attach schedule) . . . . .                                                                           |                                                                                                                                   |              |                   |                |                       |
| 15                          | Other assets (describe ▶ . . . . . ATCH 8 ) . . . . .                                                                                  |                                                                                                                                   |              | 2,884,785.        | 2,884,785.     |                       |
| 16                          | Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I) . . . . .                                |                                                                                                                                   | 138,076,336. | 143,196,658.      | 133,119,856.   |                       |
| Liabilities                 | 17                                                                                                                                     | Accounts payable and accrued expenses . . . . .                                                                                   |              |                   | 10,363.        |                       |
|                             | 18                                                                                                                                     | Grants payable . . . . .                                                                                                          |              |                   |                |                       |
|                             | 19                                                                                                                                     | Deferred revenue . . . . .                                                                                                        |              |                   |                |                       |
|                             | 20                                                                                                                                     | Loans from officers, directors, trustees, and other disqualified persons . . . . .                                                |              |                   |                |                       |
|                             | 21                                                                                                                                     | Mortgages and other notes payable (attach schedule) . . . . .                                                                     |              |                   |                |                       |
|                             | 22                                                                                                                                     | Other liabilities (describe ▶ . . . . . ATCH 9 ) . . . . .                                                                        |              |                   | 21,403.        |                       |
|                             | 23                                                                                                                                     | Total liabilities (add lines 17 through 22) . . . . .                                                                             |              | 0.                | 31,766.        |                       |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here . . . . . <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31. |                                                                                                                                   |              |                   |                |                       |
|                             | 24                                                                                                                                     | Unrestricted . . . . .                                                                                                            |              |                   |                |                       |
|                             | 25                                                                                                                                     | Temporarily restricted . . . . .                                                                                                  |              |                   |                |                       |
|                             | 26                                                                                                                                     | Permanently restricted . . . . .                                                                                                  |              |                   |                |                       |
|                             | Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.            |                                                                                                                                   |              |                   |                |                       |
|                             | 27                                                                                                                                     | Capital stock, trust principal, or current funds . . . . .                                                                        |              | 200,000.          | 41,904,617.    |                       |
|                             | 28                                                                                                                                     | Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .                                                           |              |                   |                |                       |
|                             | 29                                                                                                                                     | Retained earnings, accumulated income, endowment, or other funds . . . . .                                                        |              | 137,876,336.      | 101,260,275.   |                       |
|                             | 30                                                                                                                                     | Total net assets or fund balances (see instructions) . . . . .                                                                    |              | 138,076,336.      | 143,164,892.   |                       |
|                             | 31                                                                                                                                     | Total liabilities and net assets/fund balances (see instructions) . . . . .                                                       |              | 138,076,336.      | 143,196,658.   |                       |

## 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 | 138,076,336. |
| 2 | Enter amount from Part I, line 27a . . . . .                                                                                                                         | 2 | 4,954,928.   |
| 3 | Other increases not included in line 2 (itemize) ▶ ATCH 10 . . . . .                                                                                                 | 3 | 133,628.     |
| 4 | Add lines 1, 2, and 3 . . . . .                                                                                                                                      | 4 | 143,164,892. |
| 5 | Decreases not included in line 2 (itemize) ▶ . . . . .                                                                                                               | 5 |              |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .                                                      | 6 | 143,164,892. |

Form 990-PF (2018)

**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<br>P - Purchase<br>D - Donation                                             | (c) Date acquired<br>(mo, day, yr) | (d) Date sold<br>(mo, day, yr) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------------------------------------------------------|------------------------------------|--------------------------------|
| <b>1 a</b> SEE PART IV SCHEDULE                                                                                                                                                                                 |                                            |                                                 |                                                                                              |                                    |                                |
| <b>b</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>c</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>d</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>e</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| (e) Gross sales price                                                                                                                                                                                           | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g)                                                 |                                    |                                |
| <b>a</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>b</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>c</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>d</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>e</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69                                                                                                                     |                                            |                                                 | (i) Gains (Col (h) gain minus<br>col (k), but not less than -0-) or<br>Losses (from col (h)) |                                    |                                |
| (i) FMV as of 12/31/69                                                                                                                                                                                          | (j) Adjusted basis<br>as of 12/31/69       | (k) Excess of col (i)<br>over col (j), if any   |                                                                                              |                                    |                                |
| <b>a</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>b</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>c</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>d</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>e</b>                                                                                                                                                                                                        |                                            |                                                 |                                                                                              |                                    |                                |
| <b>2</b> Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 }                                                                      |                                            |                                                 | <b>2</b>                                                                                     | 11,153,571.                        |                                |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br>If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in<br>Part I, line 8 . . . . . |                                            |                                                 | <b>3</b>                                                                                     | 0.                                 |                                |

**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

| (a)<br>Base period years<br>Calendar year (or tax year beginning in)                                                                                                                                                                  | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col (b) divided by col (c)) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|----------------------------------------------|-----------------------------------------------------------|
| 2017                                                                                                                                                                                                                                  | 5,004,925.                               | 147,016,113.                                 | 0.034043                                                  |
| 2016                                                                                                                                                                                                                                  | 4,275,739.                               | 89,466,562.                                  | 0.047791                                                  |
| 2015                                                                                                                                                                                                                                  | 3,330,509.                               | 58,340,840.                                  | 0.057087                                                  |
| 2014                                                                                                                                                                                                                                  | 3,280,836.                               | 58,167,635.                                  | 0.056403                                                  |
| 2013                                                                                                                                                                                                                                  | 2,990,872.                               | 54,021,150.                                  | 0.055365                                                  |
| <b>2</b> Total of line 1, column (d) . . . . .                                                                                                                                                                                        |                                          |                                              | <b>2</b> 0.250689                                         |
| <b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5 0, or by<br>the number of years the foundation has been in existence if less than 5 years . . . . .                                  |                                          |                                              | <b>3</b> 0.050138                                         |
| <b>4</b> Enter the net value of noncharitable-use assets for 2018 from Part X, line 5 . . . . .                                                                                                                                       |                                          |                                              | <b>4</b> 106,590,514.                                     |
| <b>5</b> Multiply line 4 by line 3. . . . .                                                                                                                                                                                           |                                          |                                              | <b>5</b> 5,344,235.                                       |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b). . . . .                                                                                                                                                          |                                          |                                              | <b>6</b> 148,818.                                         |
| <b>7</b> Add lines 5 and 6. . . . .                                                                                                                                                                                                   |                                          |                                              | <b>7</b> 5,493,053.                                       |
| <b>8</b> Enter qualifying distributions from Part XII, line 4. . . . .<br>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<br>Part VI instructions |                                          |                                              | <b>8</b> 6,456,369.                                       |

3

**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 . . . . .<br>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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .                                                                           |    | 1        | 148,818. |
| 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        |          |
| 3 Add lines 1 and 2 . . . . .                                                                                                                                                                                                                    |    | 3        | 148,818. |
| 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        | 148,818. |
| 6 Credits/Payments                                                                                                                                                                                                                               |    |          |          |
| a 2018 estimated tax payments and 2017 overpayment credited to 2018 . . . . .                                                                                                                                                                    | 6a | 330,000. |          |
| b Exempt foreign organizations - tax withheld at source . . . . .                                                                                                                                                                                | 6b |          |          |
| c Tax paid with application for extension of time to file (Form 8868) . . . . .                                                                                                                                                                  | 6c | 100,000. |          |
| d Backup withholding erroneously withheld . . . . .                                                                                                                                                                                              | 6d |          |          |
| 7 Total credits and payments. Add lines 6a through 6d . . . . .                                                                                                                                                                                  |    | 7        | 430,000. |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached . . . . .                                                                                                                    |    | 8        |          |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .                                                                                                                                                        |    | 9        |          |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . . .                                                                                                                                           |    | 10       | 281,182. |
| 11 Enter the amount of line 10 to be Credited to 2019 estimated tax <input checked="" type="checkbox"/> 281,182. Refunded <input type="checkbox"/> <input type="checkbox"/>                                                                      |    | 11       |          |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                                                                                                                                                                          | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .                                                                                                                                                                        |     | X  |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition . . . . .<br>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<br>(1) On the foundation <input checked="" type="checkbox"/> \$ _____ (2) On foundation managers <input checked="" type="checkbox"/> \$ _____                                                                                                        |     |    |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ _____                                                                                                                                                                      |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .<br>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? . . . . .                                                                                                                                                                                                                                                                             | X   |    |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .<br>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<br>• By language in the governing instrument, or<br>• 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 <input checked="" type="checkbox"/> LA, <input type="checkbox"/>                                                                                                                                                                                    |     |    |
| 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 2018 or the tax year beginning in 2018? 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  |

**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?<br>Website address <b>WWW.HAWILSONFOUNDATION.ORG</b>                                                                                                                                                             | X   |    |
| 14 The books are in care of <b>DAVID BEACH</b> Telephone no <b>225-292-1344</b><br>Located at <b>3636 S. SHERWOOD FOREST, STE 650 BATON ROUGE, LA</b> ZIP+4 <b>70816</b>                                                                                                                                                                |     |    |
| 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <b>15</b>                                                                                                               |     |    |
| 16 At any time during calendar year 2018, 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 <b>16</b> |     | 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No                                                                                                                                                                                                                                                                                                                         |     |    |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                             |     |    |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" 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 checked="" type="checkbox"/> Yes <input 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 2018?                                                                                                                                                                                                                                                                                                                  |     | 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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If "Yes," list the years <b>2a</b>                                                                                                                                                                                                                                              |     |    |
| 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) <b>2b</b>                                                                                                                                                                                       |     |    |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <b>2c</b>                                                                                                                                                                                                                                                                                                                                                                                |     |    |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No                                                                                                                                                                                                                                                                                                          |     |    |
| b If "Yes," did it have excess business holdings in 2018 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 2018) <b>3b</b> |     | X  |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <b>4a</b>                                                                                                                                                                                                                                                                                                                                                                               |     | 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 2018? <b>4b</b>                                                                                                                                                                                                                                                              |     | X  |

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

|                                                                                                                                                                                                                                         | Yes                          | No                                     |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|----------------------------------------|
| <b>5a</b> 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))? . . . . .                                                                                                                                     | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . .                                                                           | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (3) Provide a grant to an individual for travel, study, or other similar purposes? . . . . .                                                                                                                                            | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions . . . . .                                                                                       | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> 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? . . . . .                                                         | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <b>b</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. . . . . |                              |                                        |
| Organizations relying on a current notice regarding disaster assistance, check here . . . . .                                                                                                                                           | <input type="checkbox"/>     |                                        |
| <b>c</b> 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? . . . . .                                                           | <input type="checkbox"/> Yes | <input type="checkbox"/> No            |
| If "Yes," attach the statement required by Regulations section 53.4945-5(d)                                                                                                                                                             |                              |                                        |
| <b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .                                                                                     | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .                                                                                                           |                              |                                        |
| If "Yes" to 6b, file Form 8870                                                                                                                                                                                                          |                              |                                        |
| <b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? . . . . .                                                                                                                | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .                                                                                                            |                              |                                        |
| <b>8</b> Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? . . . . .                                                             | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |

**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. See instructions.**

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|----------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| ATCH 11              |                                                           | 283,241.                                  | 27,654.                                                               | 44,656.                               |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |

**2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."**

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---------------------------------------------------------------|-----------------------------------------------------------|------------------|-----------------------------------------------------------------------|---------------------------------------|
| ATCH 12                                                       |                                                           | 249,160.         | 24,416.                                                               | 54,108.                               |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |
|                                                               |                                                           |                  |                                                                       |                                       |

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

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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. See instructions. If none, enter "NONE."**

| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
|-------------------------------------------------------------|---------------------|------------------|
| ATCH 13                                                     |                     | 314,865.         |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |

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

**Part IX-A Summary of Direct Charitable Activities**

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

|       | Expenses |
|-------|----------|
| 1 N/A |          |
| 2     |          |
| 3     |          |
| 4     |          |

**Part IX-B Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

|                                                        | Amount |
|--------------------------------------------------------|--------|
| 1 NONE                                                 |        |
| 2                                                      |        |
| All other program-related investments See instructions |        |
| 3 NONE                                                 |        |
| <b>Total.</b> Add lines 1 through 3 . . . . . ▶        |        |

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

|          |                                                                                                                     |           |              |
|----------|---------------------------------------------------------------------------------------------------------------------|-----------|--------------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes          |           |              |
| <b>a</b> | Average monthly fair market value of securities . . . . .                                                           | <b>1a</b> | 65,342,558.  |
| <b>b</b> | Average of monthly cash balances . . . . .                                                                          | <b>1b</b> | 10,782,855.  |
| <b>c</b> | Fair market value of all other assets (see instructions). . . . .                                                   | <b>1c</b> | 32,088,307.  |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c) . . . . .                                                                     | <b>1d</b> | 108,213,720. |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . . . | <b>1e</b> |              |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets . . . . .                                                      | <b>2</b>  |              |
| <b>3</b> | Subtract line 2 from line 1d. . . . .                                                                               | <b>3</b>  | 108,213,720. |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions). . . . . | <b>4</b>  | 1,623,206.   |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4         | <b>5</b>  | 106,590,514. |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5 . . . . .                                                      | <b>6</b>  | 5,329,526.   |

**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.)

|           |                                                                                                                    |           |            |
|-----------|--------------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b>  | Minimum investment return from Part X, line 6 . . . . .                                                            | <b>1</b>  | 5,329,526. |
| <b>2a</b> | Tax on investment income for 2018 from Part VI, line 5 . . . . .                                                   | <b>2a</b> | 148,818.   |
| <b>b</b>  | Income tax for 2018 (This does not include the tax from Part VI) . . . . .                                         | <b>2b</b> |            |
| <b>c</b>  | Add lines 2a and 2b. . . . .                                                                                       | <b>2c</b> | 148,818.   |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1. . . . .                                     | <b>3</b>  | 5,180,708. |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions. . . . .                                                 | <b>4</b>  |            |
| <b>5</b>  | Add lines 3 and 4 . . . . .                                                                                        | <b>5</b>  | 5,180,708. |
| <b>6</b>  | Deduction from distributable amount (see instructions). . . . .                                                    | <b>6</b>  |            |
| <b>7</b>  | <b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . . | <b>7</b>  | 5,180,708. |

**Part XII Qualifying Distributions** (see instructions)

|          |                                                                                                                                                              |           |            |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes                                                                    |           |            |
| <b>a</b> | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26. . . . .                                                                       | <b>1a</b> | 6,456,369. |
| <b>b</b> | Program-related investments - total from Part IX-B. . . . .                                                                                                  | <b>1b</b> |            |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .                                           | <b>2</b>  |            |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the                                                                                          |           |            |
| <b>a</b> | Suitability test (prior IRS approval required) . . . . .                                                                                                     | <b>3a</b> |            |
| <b>b</b> | Cash distribution test (attach the required schedule) . . . . .                                                                                              | <b>3b</b> |            |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                                            | <b>4</b>  | 6,456,369. |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions. . . . . | <b>5</b>  | 148,818.   |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .                                                                              | <b>6</b>  | 6,307,551. |

**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.

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Page **9****Part XIII Undistributed Income** (see instructions)

|                                                                                                                                                                                      | (a)<br>Corpus | (b)<br>Years prior to 2017 | (c)<br>2017 | (d)<br>2018 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2018 from Part XI, line 7 . . . . .                                                                                                                       |               |                            |             | 5,180,708.  |
| 2 Undistributed income, if any, as of the end of 2018                                                                                                                                |               |                            |             |             |
| a Enter amount for 2017 only. . . . .                                                                                                                                                |               |                            | 1,153,966.  |             |
| b Total for prior years 20 16 , 20 15 , 20 14 . . . . .                                                                                                                              |               |                            |             |             |
| 3 Excess distributions carryover, if any, to 2018                                                                                                                                    |               |                            |             |             |
| a From 2013 . . . . .                                                                                                                                                                |               |                            |             |             |
| b From 2014 . . . . .                                                                                                                                                                |               |                            |             |             |
| c From 2015 . . . . .                                                                                                                                                                |               |                            |             |             |
| d From 2016 . . . . .                                                                                                                                                                |               |                            |             |             |
| e From 2017 . . . . .                                                                                                                                                                |               |                            |             |             |
| f Total of lines 3a through e . . . . .                                                                                                                                              |               |                            |             |             |
| 4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 6,456,369.                                                                                                            |               |                            |             |             |
| a Applied to 2017, but not more than line 2a . . . . .                                                                                                                               |               |                            | 1,153,966.  |             |
| b Applied to undistributed income of prior years (Election required - see instructions). . . . .                                                                                     |               |                            |             |             |
| c Treated as distributions out of corpus (Election required - see instructions) . . . . .                                                                                            |               |                            |             |             |
| d Applied to 2018 distributable amount. . . . .                                                                                                                                      |               |                            |             | 5,180,708.  |
| e Remaining amount distributed out of corpus. . . . .                                                                                                                                | 121,695.      |                            |             |             |
| 5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a) ) . . . . .                                        |               |                            |             |             |
| 6 Enter the net total of each column as indicated below:                                                                                                                             |               |                            |             |             |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .                                                                                                                          | 121,695.      |                            |             |             |
| b Prior years' undistributed income Subtract line 4b from line 2b. . . . .                                                                                                           |               |                            |             |             |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . . |               |                            |             |             |
| d Subtract line 6c from line 6b Taxable amount - see instructions . . . . .                                                                                                          |               |                            |             |             |
| e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount - see instructions . . . . .                                                                            |               |                            |             |             |
| 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. Subtract lines 7 and 8 from line 6a . . . . .                                                                                              | 121,695.      |                            |             |             |
| 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 . . . . .                                                                                                                                                         | 121,695.      |                            |             |             |

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

NOT APPLICABLE

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling . . . . .  

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

|                                                                                                                                                                   | Tax year | Prior 3 years |          |          | (e) Total |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------|----------|----------|-----------|
|                                                                                                                                                                   | (a) 2018 | (b) 2017      | (c) 2016 | (d) 2015 |           |
| <b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .                    |          |               |          |          |           |
| <b>b</b> 85% of line 2a . . . . .                                                                                                                                 |          |               |          |          |           |
| <b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .                                                                            |          |               |          |          |           |
| <b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .                                                          |          |               |          |          |           |
| <b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .                                  |          |               |          |          |           |
| <b>3</b> Complete 3a, b, or c for the alternative test relied upon                                                                                                |          |               |          |          |           |
| <b>a</b> "Assets" alternative test - enter                                                                                                                        |          |               |          |          |           |
| <b>(1)</b> Value of all assets. . . . .                                                                                                                           |          |               |          |          |           |
| <b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .                                                                                    |          |               |          |          |           |
| <b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .                             |          |               |          |          |           |
| <b>c</b> "Support" alternative test - enter                                                                                                                       |          |               |          |          |           |
| <b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(9)), or royalties). . . . . |          |               |          |          |           |
| <b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii) . . . . .                                      |          |               |          |          |           |
| <b>(3)</b> Largest amount of support from an exempt organization. . . . .                                                                                         |          |               |          |          |           |
| <b>(4)</b> Gross investment income . . . . .                                                                                                                      |          |               |          |          |           |

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

### 1 Information Regarding Foundation Managers:

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

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

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

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

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

ATCH 14

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

- c Any submission deadlines

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

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

| Recipient                                    | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount     |
|----------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|------------|
| Name and address (home or business)          |                                                                                                           |                                |                                  |            |
| <b>a Paid during the year</b><br><br>ATCH 15 |                                                                                                           |                                |                                  |            |
| <b>Total</b> . . . . .                       |                                                                                                           |                                | ▶ <b>3a</b>                      | 5,775,450. |
| <b>b Approved for future payment</b>         |                                                                                                           |                                |                                  |            |
| <b>Total</b> . . . . .                       |                                                                                                           |                                | ▶ <b>3b</b>                      |            |

## 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)<br>Related or exempt<br>function income<br>(See instructions) |
|------------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|-------------------------------------------------------------------|
|                                                            | (a)<br>Business code      | (b)<br>Amount | (c)<br>Exclusion code                | (d)<br>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 .     | 525900                    |               | 14                                   | 155,962.      |                                                                   |
| 4 Dividends and interest from securities . . . . .         | 525900                    |               | 14                                   | 1,488,062.    |                                                                   |
| 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 | 525900                    |               | 18                                   | 11,096,050.   |                                                                   |
| 9 Net income or (loss) from special events . . . .         |                           |               |                                      |               |                                                                   |
| 10 Gross profit or (loss) from sales of inventory . .      |                           |               |                                      |               |                                                                   |
| 11 Other revenue a _____                                   |                           |               |                                      |               |                                                                   |
| b ATCH 16 _____                                            |                           | 172,357.      |                                      | -387,033.     |                                                                   |
| c _____                                                    |                           |               |                                      |               |                                                                   |
| d _____                                                    |                           |               |                                      |               |                                                                   |
| e _____                                                    |                           |               |                                      |               |                                                                   |
| 12 Subtotal Add columns (b), (d), and (e) . . . .          |                           | 172,357.      |                                      | 12,353,041.   |                                                                   |
| 13 Total. Add line 12, columns (b), (d), and (e) . . . . . |                           |               |                                      |               | 12,525,398.                                                       |

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]



**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

| Kind of Property                       |                                 | Description                              |                    |                          |                              | P or D | Date acquired     | Date sold |
|----------------------------------------|---------------------------------|------------------------------------------|--------------------|--------------------------|------------------------------|--------|-------------------|-----------|
| Gross sale price less expenses of sale | Depreciation allowed/ allowable | Cost or other basis                      | FMV as of 12/31/69 | Adj basis as of 12/31/69 | Excess of FMV over adj basis |        | Gain or (loss)    |           |
|                                        |                                 | TOTAL CAPITAL GAIN DISTRIBUTIONS         |                    |                          |                              |        | 42,943.           |           |
| 9,604,414.                             |                                 | UBS SHORT TERM COVERED<br>9,231,646.     |                    |                          |                              |        | VAR<br>372,768.   | VAR       |
| 26036927.                              |                                 | UBS LONG TERM COVERED<br>19209605.       |                    |                          |                              |        | VAR<br>6,827,322. | VAR       |
| 5,583,242.                             |                                 | UBS LONG TERM NONCOVERED<br>2,343,177.   |                    |                          |                              |        | VAR<br>3,240,065. | VAR       |
| 111739811.                             |                                 | SUNTRUST LONG TERM COVERED<br>111069403. |                    |                          |                              |        | VAR<br>670,408.   | VAR       |
| 65.                                    |                                 | FIRST EAGLE US OPPORTUNITIES FUND - USUF |                    |                          |                              |        | VAR<br>65.        | VAR       |
| TOTAL GAIN (LOSS) .....                |                                 |                                          |                    |                          |                              |        | <u>11153571.</u>  |           |

ATTACHMENT 1FORM 990PF, PART I - OTHER INCOME

| DESCRIPTION                       | REVENUE<br>AND<br>EXPENSES<br>PER BOOKS | NET<br>INVESTMENT<br>INCOME |
|-----------------------------------|-----------------------------------------|-----------------------------|
| CALIM BRIDGE PARTNERS             | -33.                                    | -33.                        |
| DUNWOODY PARTNERS LP              | 106,394.                                | 66,674.                     |
| HUEY WILSON INTERESTS             | -72,423.                                |                             |
| PETROLEUM TOWER OF LAFAYETTE      | 89,477.                                 | 86,887.                     |
| PIEDMONT PARTNERS LP              | -1,369,889.                             | 1,855,475.                  |
| SHERWOOD II                       | -27,521.                                | -29,809.                    |
| SHERWOOD TOWER LLC                | -103,595.                               | -103,595.                   |
| WHITEBOX MULTI-STRATEGY LTD       | 267,978.                                | 267,978.                    |
| EMERGING PRIVATE MARKETS FUND     | 13,937.                                 | 52,900.                     |
| PIEDMONT PARTNERS OFFSHORE LP     | 345,639.                                | 345,639.                    |
| STONE MOUNTAIN PARTNERS LTD       | 24,489.                                 | 24,489.                     |
| WHITEBOX RELATIVE VALUE LTD       | 515,424.                                | 515,425.                    |
| EMERGING PRIVATE MARKETS (CAYMAN) | -13,937.                                | -13,937.                    |
| PENSCO INVESTMENT                 | 391.                                    | 391.                        |
| OTHER INVESTMENT INCOME           | 8,621.                                  | 1,630.                      |
| MISCELLANEOUS INCOME              | 372.                                    |                             |
| TOTALS                            | -214,676.                               | 3,070,114.                  |

ATTACHMENT 2FORM 990PF, PART I - OTHER PROFESSIONAL FEES

| <u>DESCRIPTION</u>         | <u>REVENUE<br/>AND<br/>EXPENSES<br/>PER BOOKS</u> | <u>NET<br/>INVESTMENT<br/>INCOME</u> | <u>CHARITABLE<br/>PURPOSES</u> |
|----------------------------|---------------------------------------------------|--------------------------------------|--------------------------------|
| INVESTMENT MANAGEMENT FEES | 859,248.                                          | 859,248.                             |                                |
| OTHER PROFESSIONAL FEES    | 5,445.                                            |                                      | 5,445.                         |
| TOTALS                     | <u>864,693.</u>                                   | <u>859,248.</u>                      | <u>5,445.</u>                  |

ATTACHMENT 3

FORM 990PF, PART I - TAXES

| <u>DESCRIPTION</u> | <u>REVENUE<br/>AND<br/>EXPENSES<br/>PER BOOKS</u> | <u>NET<br/>INVESTMENT<br/>INCOME</u> |
|--------------------|---------------------------------------------------|--------------------------------------|
| FOREIGN TAXES PAID | 6,894.                                            | 11,557.                              |
| TOTALS             | <u>6,894.</u>                                     | <u>11,557.</u>                       |

ATTACHMENT 4FORM 990PF, PART I - OTHER EXPENSES

| DESCRIPTION              | REVENUE<br>AND<br>EXPENSES<br>PER BOOKS | NET<br>INVESTMENT<br>INCOME | CHARITABLE<br>PURPOSES |
|--------------------------|-----------------------------------------|-----------------------------|------------------------|
| INSURANCE                | 3,102.                                  | 776.                        | 2,327.                 |
| BANK FEES                | 460.                                    | 460.                        |                        |
| DUES & SUBSCRIPTIONS     | 15,179.                                 |                             | 15,179.                |
| COMPUTER/WEB SERVICES    | 10,926.                                 |                             | 10,926.                |
| SOFTWARE AND MAINTENANCE | 26,529.                                 |                             | 26,529.                |
| SUPPLIES                 | 4,672.                                  |                             | 4,672.                 |
| OFFICE EQUIPMENT         | 2,007.                                  |                             | 1,505.                 |
| PROFESSIONAL DEVELOPMENT | 3,032.                                  |                             | 3,032.                 |
| TELEPHONE/COMMUNICATIONS | 6,062.                                  |                             | 3,031.                 |
| TRAINING                 | 5,010.                                  |                             | 5,010.                 |
| ADVERTISING              | 2,500.                                  |                             | 2,500.                 |
| DONATIONS                | 2,407.                                  |                             |                        |
| AUTOMOBILE               | 354.                                    |                             |                        |
| MEALS & ENTERTAINMENT    | 2,188.                                  |                             |                        |
| TRAVEL                   | 8,592.                                  |                             | 8,592.                 |
| TOTALS                   | 93,020.                                 | 1,236.                      | 83,303.                |

ATTACHMENT 5

FORM 990PF, PART II - PREPAID EXPENSES AND DEFERRED CHARGES

| DESCRIPTION                  | ENDING<br>BOOK VALUE | ENDING<br>FMV |
|------------------------------|----------------------|---------------|
| PREPAID EXCISE/INCOME TAXES  | 190,000.             | 190,000.      |
| PENDING WHITEBOX REDEMPTIONS | 5,043,933.           | 5,043,933.    |
| TOTALS                       | 5,233,933.           | 5,233,933.    |

FORM 990PF, PART II - CORPORATE STOCKATTACHMENT 6

| <u>DESCRIPTION</u>             | <u>ENDING<br/>BOOK VALUE</u> | <u>ENDING<br/>FMV</u> |
|--------------------------------|------------------------------|-----------------------|
| SUNTRUST INVESTMENT PORTFOLIOS | 107,536,054.                 | 98,169,351.           |
| TOTALS                         | <u>107,536,054.</u>          | <u>98,169,351.</u>    |

FORM 990PF, PART II - OTHER INVESTMENTSATTACHMENT 7

| <u>DESCRIPTION</u>            | <u>ENDING<br/>BOOK VALUE</u> | <u>ENDING<br/>FMV</u> |
|-------------------------------|------------------------------|-----------------------|
| WHITEBOX MULTI-STRATEGY FUND  | 1,190,716.                   | 1,190,716.            |
| CALIM BRIDGE PARTNERS II      | 839,053.                     | 839,053.              |
| MS EMERGING PRIVATE MKTS FUND | 962,228.                     | 970,154.              |
| PIEDMONT PARTNERS LP          | 7,602,412.                   | 7,602,412.            |
| STONE MOUNTAIN PARTNERS, LTD  | 678,157.                     | 678,157.              |
| DUNWOODY PARTNERS             |                              |                       |
| SHERWOOD TOWER                | 2,159,090.                   | 2,050,000.            |
| PETROLEUM TOWER OF LAFAYETTE  | 2,892,536.                   | 2,475,000.            |
| SHERWOOD II                   | 641,399.                     | 450,000.              |
| HUEY WILSON INTERESTS INC     | -552,607.                    | -552,607.             |
| ENERGY TRANSFER EQUITY        | -4,708.                      | -4,708.               |
| PENSCO INVESTMENT             |                              |                       |
| EMERGING PRIVATE MKTS FUND I  | 721,639.                     | 721,639.              |
| PIEDMONT PARTNERS OFFSHORE LP | 7,549,772.                   | 7,549,772.            |
| WHITEBOX REL VALUE FUND LTD   |                              |                       |
| TOTALS                        | <u>24,679,687.</u>           | <u>23,969,588.</u>    |

FORM 990PF, PART II - OTHER ASSETSATTACHMENT 8

| <u>DESCRIPTION</u>     | <u>ENDING<br/>BOOK VALUE</u> | <u>ENDING<br/>FMV</u> |
|------------------------|------------------------------|-----------------------|
| DUE FROM WILSON ESTATE | 2,884,785.                   | 2,884,785.            |
| TOTALS                 | <u>2,884,785.</u>            | <u>2,884,785.</u>     |

ATTACHMENT 9FORM 990PF, PART II - OTHER LIABILITIESDESCRIPTIONENDING  
BOOK VALUE

PAYROLL LIABILITIES

21,403.

TOTALS

21,403.

ATTACHMENT 10FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

| <u>DESCRIPTION</u>      | <u>AMOUNT</u>   |
|-------------------------|-----------------|
| PRIOR PERIOD ADJUSTMENT | 133,628.        |
| TOTAL                   | <u>133,628.</u> |

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 11

| <u>NAME AND ADDRESS</u>                                                                      | <u>TITLE AND AVERAGE HOURS PER<br/>WEEK DEVOTED TO POSITION</u> | <u>COMPENSATION</u> | <u>CONTRIBUTIONS<br/>TO EMPLOYEE<br/>BENEFIT PLANS</u> | <u>EXPENSE ACCT<br/>AND OTHER<br/>ALLOWANCES</u> |
|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------|---------------------|--------------------------------------------------------|--------------------------------------------------|
| DONNA M. SAURAGE<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816   | TRUSTEE<br>1.00                                                 | 0.                  | 0.                                                     | 0.                                               |
| DIANNE WILSON<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816      | TRUSTEE<br>1.00                                                 | 0.                  | 0.                                                     | 0.                                               |
| DENVER C. WILSON<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816   | TRUSTEE<br>1.00                                                 | 0.                  | 0.                                                     | 0.                                               |
| J. GERARD JOLLY<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816    | TRUSTEE<br>2.00                                                 | 0.                  | 0.                                                     | 0.                                               |
| J.H. CAMPBELL, JR.<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816 | TRUSTEE<br>5.00                                                 | 0.                  | 0.                                                     | 0.                                               |

## FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

## ATTACHMENT 11 (CONT'D)

| NAME AND ADDRESS                                                                             | TITLE AND AVERAGE HOURS PER<br>WEEK DEVOTED TO POSITION | COMPENSATION | CONTRIBUTIONS<br>TO EMPLOYEE<br>BENEFIT PLANS | EXPENSE ACCT<br>AND OTHER<br>ALLOWANCES |
|----------------------------------------------------------------------------------------------|---------------------------------------------------------|--------------|-----------------------------------------------|-----------------------------------------|
| CORNELIUS A. LEWIS<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816 | TRUSTEE<br>1.00                                         | 0.           | 0.                                            | 0.                                      |
| DANIEL J. BEVAN<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816    | PRESIDENT/TRUSTEE<br>20.00                              | 149,241.     | 14,254.                                       | 18,014.                                 |
| RENEE D. JOYAL<br>3636 SOUTH SHERWOOD FOREST BLVD.<br>SUITE 650<br>BATON ROUGE, LA 70816     | TRUSTEE<br>40.00                                        | 134,000.     | 13,400.                                       | 26,642.                                 |
| GRAND TOTALS                                                                                 |                                                         | 283,241.     | 27,654.                                       | 44,656.                                 |

990PF, PART VIII - COMPENSATION OF THE FIVE HIGHEST PAID EMPLOYEES

| <u>NAME AND ADDRESS</u>                                                                       | <u>ATTACHMENT 12</u>                                                |                     |                                                                                                         |
|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------|---------------------|---------------------------------------------------------------------------------------------------------|
|                                                                                               | <u>TITLE AND AVERAGE<br/>HOURS PER WEEK<br/>DEVOTED TO POSITION</u> | <u>COMPENSATION</u> | <u>CONTRIBUTIONS<br/>TO EMPLOYEE<br/>BENEFIT PLANS</u> <u>EXPENSE ACCT<br/>AND OTHER<br/>ALLOWANCES</u> |
| JAN ROSS<br>3636 SOUTH SHERWOOD FOREST<br>BLVD., SUITE 650<br>BATON ROUGE, LA 70816           | EMPLOYEE<br>40.00                                                   | 130,000.            | 12,500. 34,867.                                                                                         |
| TRISTI CHARPENTIER<br>3636 SOUTH SHERWOOD FOREST<br>BLVD., SUITE 650<br>BATON ROUGE, LA 70816 | EMPLOYEE<br>40.00                                                   | 80,000.             | 8,000. 19,151.                                                                                          |
| STEPHANIE ROSS<br>3636 SOUTH SHERWOOD FOREST<br>BLVD., SUITE 650<br>BATON ROUGE, LA 70816     | EMPLOYEES<br>40.00                                                  | 39,160.             | 3,916. 90.                                                                                              |
| TOTAL COMPENSATION                                                                            |                                                                     | 249,160.            | 24,416. 54,108.                                                                                         |

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALSATTACHMENT 13

| <u>NAME AND ADDRESS</u>                                               | <u>TYPE OF SERVICE</u> | <u>COMPENSATION</u> |
|-----------------------------------------------------------------------|------------------------|---------------------|
| UBS<br>10375 PARK MEADOW DRIVE, SUITE 400<br>LITTLETON, CO 80124-6736 | INVESTMENT MGMT        | 184,959.            |
| SUNTRUST BANK<br>303 PEACHTREE STREET N.E.<br>ATLANTA, GA 30308       | INVESTMENT MGMT        | 129,906.            |
| TOTAL COMPENSATION                                                    |                        | <u>314,865.</u>     |

ATTACHMENT 14FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

## ON-LINE SUBMISSION ONLY

FORM IN WHICH APPLICATION SHOULD BE SUBMITTED AND INFORMATION THEY SHOULD INCLUDE:

ON-LINE SUBMISSION ONLY

REQUESTS WILL BE ACCEPTED ONLY THROUGH ON-LINE SUBMISSION AT [WWW.HAWILSONFOUNDATION.ORG](http://WWW.HAWILSONFOUNDATION.ORG).

SUBMISSION DEADLINES:ON-LINE SUBMISSION ONLY

GRANT REQUESTS ARE DUE THE FOURTH FRIDAY OF FEBRUARY AND AUGUST OF EACH YEAR

RESTRICTIONS OR LIMITATIONS ON AWARDS:ON-LINE SUBMISSION ONLY

THE FOUNDATION WILL CONSIDER GRANT APPLICATIONS ONLY FROM 501(C)(3) ORGANIZATIONS WHO SERVE THE GREATER BATON ROUGE AREA OR WITH STATEWIDE FOCUS.

The Huey Angelina Wilson Foundation  
 EIN: 58-1714586  
 Tax Year Ending 12/31/2018

Grants Paid Detail

| Recipient Name and Address                       | Relationship to Substantial Contributor | Status of Recipient | Purpose of Grant or Contributions                                | Amount     |
|--------------------------------------------------|-----------------------------------------|---------------------|------------------------------------------------------------------|------------|
| Gulf Coast Housing Partnership                   | None                                    |                     | General support                                                  | 250,000 00 |
| Salvation Army                                   | None                                    | PC                  | General support                                                  | 4,000 00   |
| 100 Black Men of Metropolitan BR                 | None                                    | PC                  | Continued Support for Executive Director                         | 30,000 00  |
| A Door Of Hope Ministries                        | None                                    | PC                  | Breaking the Cycle                                               | 25,000 00  |
| Adult Literacy Advocates Of Greater Bato         | None                                    | PC                  | Teaching Literacy Skills in Technology                           | 22,000 00  |
| Alzheimer's Services of the Capital Area         | None                                    | PC                  | Memories Lunch Challenge Grant                                   | 35,000 00  |
| Alzheimer's Services of the Capital Area         | None                                    | PC                  | Montessori Inspired Lifestyle - Memory Boot Camp for Alzheimer's | 25,000 00  |
| American Cancer Society, Inc                     | None                                    | PC                  | Patient Services in Greater Baton Rouge                          | 25,000 00  |
| American National Red Cross                      | None                                    | PC                  | ARC Humanitarian Services Fleet Campaign                         | 36,000 00  |
| AMikids Baton Rouge                              | None                                    | PC                  | Family Support and Youth Transition Program                      | 30,000 00  |
| ARC Baton Rouge                                  | None                                    | PC                  | Arc Children's Services Community Connections                    | 25,000 00  |
| Awana Clubs International                        | None                                    | PC                  | Awana Lifeline                                                   | 40,000 00  |
| Awana Lifeline Ministries                        | None                                    | PC                  | Lifeline                                                         | 30,000 00  |
| Baton Rouge Area Foundation                      | None                                    | PC                  | EBR Crime Fund                                                   | 25,000 00  |
| Baton Rouge Children's Advocacy Center           | None                                    | PC                  | Trauma Response and Recovery/Education and Prevention            | 33,200 00  |
| Baton Rouge Youth Coalition, Inc (BRYC)          | None                                    | PC                  | Associate Director of College Programs                           | 40,000 00  |
| Baton Rouge Zion City & Glen Oaks Commun         | None                                    | PC                  | Family Counseling and After- School                              | 35,000 00  |
| Big Buddy Program                                | None                                    | PC                  | Voyager                                                          | 40,000 00  |
| Boy Scouts America, Istrouma Area Council        | None                                    | PC                  | STEM Education for East Baton Rouge Housing Authority Youth      | 50,000 00  |
| Bridge Center for Hope - Baton Rouge             | None                                    | PC                  | Bridge Operations                                                | 25,000 00  |
| Cancer Services of Greater Baton Rouge           | None                                    | PC                  | Direct Assistance Program for Cancer Patients                    | 40,000 00  |
| Capital Area Alliance for the Homeless           | None                                    | PC                  | Tiny Homes, Big Solutions Symposium                              | 1,000 00   |
| Capital Area Alliance for the Homeless           | None                                    | PC                  | Client Support Services Grant                                    | 50,000 00  |
| Capital Area Family Violence Intervention        | None                                    | PC                  | Project COED - Community Outreach Education                      | 31,200 00  |
| Capital Area Family Violence Intervention        | None                                    | PC                  | Pathways To Independence                                         | 10,000 00  |
| Capital Area Human Services District             | None                                    | PC                  | Behavioral Health Reentry Program                                | 50,000 00  |
| Capital Area Reentry Coalition                   | None                                    | PC                  | Building the Best                                                | 1,000 00   |
| Capitol Area Reentry Program Inc                 | None                                    | PC                  | Connecting to Success                                            | 30,000 00  |
| Career Compass of Louisiana                      | None                                    | PC                  | Increasing At-Risk Students' College Access                      | 37,000 00  |
| Catholic Charities of the Diocese of Baton Rouge | None                                    | PC                  | Joseph Homes, Inc                                                | 62,000 00  |
| Center Foundation                                | None                                    | PC                  | Baton Rouge Health and Human Services                            | 15,000 00  |
| Center for Justice Innovation                    | None                                    | PC                  | Center for Justice Innovation - Reentry Services                 | 70,000 00  |
| Church United for Community Development          | None                                    | PC                  | Kingdom Men Case Manager                                         | 40,000 00  |

The Huey Angelina Wilson Foundation  
 EIN: 58-1714586  
 Tax Year Ending 12/31/2018

Grants Paid Detail

| Recipient Name and Address                     | Relationship to Substantial Contributor | Status of Recipient | Purpose of Grant or Contributions                                                 | Amount     |
|------------------------------------------------|-----------------------------------------|---------------------|-----------------------------------------------------------------------------------|------------|
| Church United for Community Development        | None                                    | PC                  | Kingdom Men New Level St James                                                    | 75,000 00  |
| COEA                                           | None                                    | PC                  | Program Transportation and Outreach                                               | 30,000 00  |
| Community Care Outreach Center                 | None                                    | PC                  | Director                                                                          | 30,000 00  |
| Connections For Life, Inc                      | None                                    | PC                  | Connect2Empower                                                                   | 30,000 00  |
| Cristo Rey Baton Rouge                         | None                                    | PC                  | Transportation & Technology Needs                                                 | 25,000 00  |
| Cristo Rey Baton Rouge                         | None                                    | PC                  | Moving and Transportation Needs                                                   | 30,000 00  |
| Cristo Rey Baton Rouge                         | None                                    | PC                  | Bridging the Gap for Under-Enrollment                                             | 100,000 00 |
| Exceptional Lives Inc                          | None                                    | PC                  | Spanish Resource Directory for Louisiana Families of Children with Disabilities   | 20,000 00  |
| Family Service of Greater Baton Rouge          | None                                    | PC                  | Thinking for a Change                                                             | 40,000 00  |
| Franciscan Missionaries of Our Lady University | None                                    | PC                  | Applied Behavior Analysis Certificate Program                                     | 50,000 00  |
| Gateway Therapeutic Horsemanship               | None                                    | PC                  | Expanding Equine Assisted Therapy (EAT) Services                                  | 30,000 00  |
| Gardere Community Christian School             | None                                    | PC                  | Double Down on Excellence                                                         | 90,000 00  |
| Gardere Initiative                             | None                                    | PC                  | Gardere After-School Tutoring                                                     | 21,000 00  |
| Girl Scouts Louisiana East                     | None                                    | PC                  | Strengthening the Girl Scouts Beyond Bars Program                                 | 17,830 00  |
| Goodwill Industries Of Southeastern Loui       | None                                    | PC                  | Goodwill Reintegration Program (GRIP)                                             | 100,000 00 |
| Greater Baton Rouge Food Bank                  | None                                    | PC                  | Bucks For Trucks                                                                  | 50,000 00  |
| Greater Baton Rouge Hope Academy               | None                                    | PC                  | Growing the Hope Family                                                           | 53,500 00  |
| Greater Baton Rouge Hope Academy               | None                                    | PC                  | Halos For Hope Challenge Grant                                                    | 50,000 00  |
| Greater Baton Rouge Hope Academy               | None                                    | PC                  | Leadership Restructuring Project                                                  | 50,000 00  |
| Gulf Coast Housing Partnership                 | None                                    | PC                  | Affordable Housing and Community Development Baton Rouge and Donaldsonville Areas | 50,000 00  |
| Habitat for Humanity of Greater Baton Ro       | None                                    | PC                  | Habitat & Hunt's Cabinet Program                                                  | 21,000 00  |
| Healing Place Serve                            | None                                    | PC                  | HP Serve Operating Support                                                        | 30,000 00  |
| Healing Place Serve                            | None                                    | PC                  | HP Serve Technology Expansion and Capacity Building Project                       | 20,000 00  |
| Heritage Ranch                                 | None                                    | PC                  | Counseling and Education Center Challenge                                         | 20,000 00  |
| HOPE Ministries                                | None                                    | PC                  | The Way to Work                                                                   | 50,000 00  |
| HOPE Ministries                                | None                                    | PC                  | Technology and Training Equipment Support                                         | 14,500 00  |
| HOPE Ministries of Pointe Coupee, Inc          | None                                    | PC                  | Continue to Strengthen HOPE                                                       | 20,000 00  |
| Interfaith Federation of Greater Baton R       | None                                    | PC                  | Holy Grill Leveraging Our Impact                                                  | 20,000 00  |
| Junior Achievement of Greater Baton Roug       | None                                    | PC                  | Empowering Teens with Employability Skills                                        | 20,000 00  |
| LANO                                           | None                                    | PC                  | LANO Community Leaders Baton Rouge                                                | 30,000 00  |
| LANO                                           | None                                    | PC                  | LANO Board Chair Boot Camp                                                        | 25,000 00  |
| LANO                                           | None                                    | PC                  | LANO Community Leaders BR - HAWF 20/10 Challenge                                  | 5,000 00   |
| LANO                                           | None                                    | PC                  | Annual support                                                                    | 5,000 00   |

The Huey Angelina Wilson Foundation  
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Grants Paid Detail

| Recipient Name and Address                      | Relationship to Substantial Contributor | Status of Recipient | Purpose of Grant or Contributions                                                     | Amount       |
|-------------------------------------------------|-----------------------------------------|---------------------|---------------------------------------------------------------------------------------|--------------|
| Life Of A Single Mom                            | None                                    | PC                  | Capacity Building                                                                     | 47,000 00    |
| Louisiana Center For Childrens Rights           | None                                    | PC                  | Baton Rouge Advanced Advocacy Project                                                 | 50,000 00    |
| Louisiana Hemophilia Foundation                 | None                                    | PC                  | Scholarship Reimbursements                                                            | 15,000 00    |
| Louisiana Hemophilia Foundation                 | None                                    | PC                  | Annual Support                                                                        | 50,000 00    |
| Louisiana Hemophilia Foundation                 | None                                    | PC                  | Mental Health Support in the Bleeding Disorders Community                             | 23,800 00    |
| Louisiana Industries for the Disabled, Inc      | None                                    | PC                  | WCRC Transportation 2018                                                              | 23,500 00    |
| Louisiana Interchurch Conference                | None                                    | PC                  | Louisiana InterChurch Conference Criminal Justice Church-Based Education and Outreach | 20,000 00    |
| Louisiana Key Academy                           | None                                    | PC                  | Year-Round School Pilot Program                                                       | 25,000 00    |
| Louisiana Key Academy                           | None                                    | PC                  | Louisiana Key Academy Academic Lab Program                                            | 15,000 00    |
| Louisiana Parole Project                        | None                                    | PC                  | LA-PRI East Baton Rouge Parish Community Coordinator                                  | 20,000 00    |
| Louisiana Parole Project                        | None                                    | PC                  | Center for Justice Innovation - Reentry Services                                      | 80,000 00    |
| Louisiana Parole Project                        | None                                    | PC                  | LA-PRI Implementation Project                                                         | 40,000 00    |
| Louisiana Partnership For Children And Families | None                                    | PC                  | Building Children's Advocacy Infrastructure                                           | 29,500 00    |
| Louisiana Public Health Institute               | None                                    | PC                  | LA-PRI State Level Data Project                                                       | 25,000 00    |
| Louisiana Resource Center for Educators         | None                                    | PC                  | Reach For Success Summer Enrichment                                                   | 40,000 00    |
| Louisiana Resource Center for Educators         | None                                    | PC                  | CoLab to Certification (CLC)                                                          | 25,000 00    |
| LSU Foundation                                  | None                                    | PC                  | LSU Parole and Reentry Clinic                                                         | 40,000 00    |
| Maison des Ami of Louisiana, Inc                | None                                    | PC                  | Permanent Supportive Housing                                                          | 50,000 00    |
| Mary Bird Perkins Cancer Center                 | None                                    | PC                  | Direct Assistance for Cancer Patients                                                 | 25,000 00    |
| McMains Children's Developmental Center         | None                                    | PC                  | Challenge Grant and Equipment                                                         | 30,000 00    |
| Meaningful Autistic Resources for Kids          | None                                    | PC                  | Camp MARK                                                                             | 10,000 00    |
| Mental Health Association for Greater BR        | None                                    | PC                  | Annual Appeal Match/Annual Conference                                                 | 13,854 00    |
| Mental Health Association for Greater BR        | None                                    | PC                  | Development Director and Assistant                                                    | 35,000 00    |
| Mental Health Association for Greater BR        | None                                    | PC                  | Annual Appeal Match/Annual Conference                                                 | 6,146 00     |
| Mental Health Association for Greater BR        | None                                    | PC                  | MHA Annual Appeal and Annual Conference                                               | 10,000 00    |
| MetroMorphosis                                  | None                                    | PC                  | The Baton Rouge Reentry Collaborative A Model for Change                              | 40,000 00    |
| MetroMorphosis                                  | None                                    | PC                  | Sustainable Funding                                                                   | 50,000 00    |
| MetroMorphosis                                  | None                                    | PC                  | Expanding the Container for Change                                                    | 50,000 00    |
| Mission Heart Inc                               | None                                    | PC                  | Life Skills Curriculum                                                                | 10,000 00    |
| Mission Heart Inc                               | None                                    | PC                  | Appliance update- Air conditioning system                                             | 10,000 00    |
| New Schools For Baton Rouge                     | None                                    | PC                  | New Schools for Baton Rouge - City Year - Teach For America Talent Partnership        | 1,000,000 00 |
| NO/AIDS Task Force                              | None                                    | PC                  | HIV/AIDS Legal Services                                                               | 30,000 00    |
| O'Brien House                                   | None                                    | PC                  | Relapse Prevention for Successful Reentry                                             | 68,000 00    |

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| O'Brien House                            | None                                    | PC                  | Challenge Grant for Capital Equipment                                         | 11,623 00  |
| O'Brien House                            | None                                    | PC                  | Contingency Plan for Continuity of EBR LA-PRI Community Coordinator Role      | 25,000 00  |
| O'Brien House                            | None                                    | PC                  | Annual support                                                                | 18,377 00  |
| O'Brien House                            | None                                    | PC                  | Phase 1 Combination Planning and Matching Grant for Campus Development        | 50,000 00  |
| One Touch Ministry Inc                   | None                                    | PC                  | OTM Housing Re-Entry Program                                                  | 70,000 00  |
| PAR-LA                                   | None                                    | PC                  | Unbudgeted Expenses for Relocation                                            | 7,500 00   |
| Policy Institute For The Children Of LA  | None                                    | PC                  | Early Care & Education Master Plan                                            | 25,000 00  |
| Re-Entry Court Services of Greater Baton | None                                    | PC                  | 19th JDC Re-Entry Court Program                                               | 30,000 00  |
| Re-Entry Court Services of Greater Baton | None                                    | PC                  | 19th JDC Re-Entry Court Program                                               | 10,000 00  |
| Salvation Army                           | None                                    | PC                  | Pathway of Hope                                                               | 50,000 00  |
| Salvation Army                           | None                                    | PC                  | The Salvation Army Corps Community Youth Programs                             | 20,000 00  |
| Sexual Trauma Awareness and Response     | None                                    | PC                  | STAR Community Education Program                                              | 31,000 00  |
| SocialWorx Institute, Inc                | None                                    | PC                  | The LA-PRI Steering Team Association - Training and Capacity Building Project | 25,000 00  |
| St Bernard Project Inc                   | None                                    | PC                  | Challenge Grant for Baton Rouge Recovery*                                     | 50,000 00  |
| St James Council On Aging                | None                                    | PC                  | Caring Hands                                                                  | 15,000 00  |
| St Lillian Academy                       | None                                    | PC                  | Technology infrastructure and internet upgrade                                | 33,000 00  |
| St Paul Adult Learning Center            | None                                    | PC                  | SPALC Annual Fund Challenge Match                                             | 17,700 00  |
| St Vincent de Paul                       | None                                    | PC                  | SVdP Day & Emergency/Disaster Shelter                                         | 50,000 00  |
| St Vincent de Paul                       | None                                    | PC                  | Bishop Ott Shelter Transportation Outreach Project                            | 38,720 00  |
| Stand For Children Leadership Center     | None                                    | PC                  | Collaboratively Improving BR's Education System                               | 30,000 00  |
| Texas Public Policy Foundation           | None                                    | PC                  | Right on Crime Louisiana Reentry                                              | 70,000 00  |
| The CEO MIND Foundation                  | None                                    | PC                  | THE YOUTH EMPOWERMENT ZONE                                                    | 10,000 00  |
| The Emerge Center (BR Speech and Hearing | None                                    | PC                  | Filling the Gap Challenge                                                     | 30,000 00  |
| The Emerge Center (BR Speech and Hearing | None                                    | PC                  | Children's Development Center Coordinator                                     | 50,000 00  |
| Thrive Baton Rouge                       | None                                    | PC                  | Thrive Academy Academic Building                                              | 100,000 00 |
| Uplifted, Inc                            | None                                    | PC                  | WCRC Co-Occurring Disorder Track Pilot Program                                | 45,200 00  |
| Urban League of Louisiana                | None                                    | PC                  | Career Pathway Program for Returning Citizens                                 | 40,000 00  |
| Urban League of Louisiana                | None                                    | PC                  | Project Ready                                                                 | 30,000 00  |
| Urban Restoration Enhancement Corporatio | None                                    | PC                  | Ignite Program (formerly, NBR Youth Development)                              | 20,000 00  |
| Urban Restoration Enhancement Corporatio | None                                    | PC                  | UREC Affordable Housing Programs                                              | 20,000 00  |
| Via Link Inc                             | None                                    | PC                  | National Suicide Lifeline Call Support for Baton Rouge                        | 30,000 00  |
| Volunteers of Amer Greater Baton Rouge   | None                                    | PC                  | A New Beginning, a Clean Start                                                | 29,200 00  |
| Volunteers of America Greater Baton Roug | None                                    | PC                  | Celebration For Change 2018 Challenge                                         | 30,000 00  |

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| Weproducegrads             | None                                    | PC                  | Istrouma High School Aquaponics Project   | 20,000 00           |
| Young Leaders Academy      | None                                    | PC                  | YLA Project REVIVE @ 25                   | 25,000 00           |
| Youth Oasis                | None                                    | PC                  | Therapeutic Foster Care                   | 56,100 00           |
| YWCA Greater Baton Rouge   | None                                    | PC                  | The YWCA's Freedom Project                | 40,000 00           |
| YWCA Greater Baton Rouge   | None                                    | PC                  | SHILE (Teen Pregnancy Prevention) Project | 30,000 00           |
| <b>Total Grants Paid</b>   |                                         |                     |                                           | <b>5,775,450.00</b> |

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUEATTACHMENT 16

| DESCRIPTION                                     | BUSINESS<br>CODE | EXCLUSION |      | RELATED OR EXEMPT<br>FUNCTION INCOME |  |
|-------------------------------------------------|------------------|-----------|------|--------------------------------------|--|
|                                                 |                  | AMOUNT    | CODE | AMOUNT                               |  |
| OTHER MISCELLANEOUS INCOME<br>INVESTMENT INCOME | 525990           |           | 01   | 372.                                 |  |
|                                                 | 525990           | 172,357.  | 01   | -387,405.                            |  |
| TOTALS                                          |                  | 172,357.  |      | -387,033.                            |  |