

EXTENDED TO MAY 15, 2020  
**Return of Private Foundation**  
 or Section 4947(a)(1) Trust Treated as Private Foundation

Form **990-PF**Department of the Treasury  
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.  
 Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No 1545-0052

**2018**

Open to Public Inspection

For calendar year 2018 or tax year beginning

JUL 1, 2018

and ending

JUN 30, 2019

Name of foundation

**WILSON SHEEHAN FOUNDATION**

Number and street (or P.O. box number if mail is not delivered to street address)

**P.O. BOX 3085**

Room/suite

A Employer identification number

**32-6266976**

B Telephone number

**203-459-2703**

City or town, state or province, country, and ZIP or foreign postal code

**SPRINGFIELD, OH 45501**

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationI Fair market value of all assets at end of year  
(from Part II, col. (c), line 16)**\$ 47,088,617.**

J Accounting method:

☐ Cash☒ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis.)

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test,  
check here and attach computation ☐E If private foundation status was terminated  
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐

**Part I Analysis of Revenue and Expenses**  
 (The total of amounts in columns (b), (c), and (d) may not  
 necessarily equal the amounts in column (a))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>				
1 Contributions, gifts, grants, etc., received	4,033,320.		N/A	
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments	60.	60.		STATEMENT 2
4 Dividends and interest from securities	931,958.	673,684.		STATEMENT 3
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	675,615.			STATEMENT 1
b Gross sales price for all assets on line 6a	13,357,914.			
7 Capital gain net income (from Part IV, line 2)		1,299,887.		
8 Net short-term capital gain				
9 Income modifications				
Gross sales less returns and allowances				
10a Less: Cost of goods sold				
b Gross profit or (loss)				
11 Other income	818,164.	939,482.		
12 Total. Add lines 1 through 11	6,459,117.	2,913,113.		
<b>Operating and Administrative Expenses</b>				
13 Compensation of officers, directors, trustees, etc	189,750.	0.		189,750.
14 Other employee salaries and wages	56,125.	0.		56,125.
15 Pension plans, employee benefits	12,294.	0.		12,294.
16a Legal fees STMT 5	8,305.	0.		8,305.
b Accounting fees STMT 6	8,729.	0.		8,729.
c Other professional fees STMT 7	192,957.	192,957.		0.
17 Interest				
18 Taxes STMT 8	97,178.	8,107.		15,238.
19 Depreciation and depletion	2,185.	0.		
20 Occupancy	9,750.	0.		9,750.
21 Travel, conferences, and meetings	8,604.	0.		8,604.
22 Printing and publications				
23 Other expenses STMT 9	50,207.	0.		50,207.
24 Total operating and administrative expenses. Add lines 13 through 23	636,084.	201,064.		359,002.
25 Contributions, gifts, grants paid	3,756,450.			4,190,393.
26 Total expenses and disbursements. Add lines 24 and 25	4,392,534.	201,064.		4,549,395.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	2,066,583.			
b Net investment income (if negative, enter -0-)		2,712,049.		
c Adjusted net income (if negative, enter -0-)			N/A	

Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing				
	2 Savings and temporary cash investments	69,597.	89,943.	89,943.	
	3 Accounts receivable ▶				
	Less: allowance for doubtful accounts ▶				
	4 Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock STMT 10	17,499,408.	14,734,083.	20,408,139.	
	c Investments - corporate bonds STMT 11	5,369,130.	7,103,001.	7,305,726.	
	11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶					
12 Investments - mortgage loans					
13 Investments - other STMT 12	15,815,652.	18,461,585.	19,278,755.		
14 Land, buildings, and equipment basis ▶ 29,044.					
Less: accumulated depreciation STMT 13 ▶ 22,990.	8,239.	6,054.	6,054.		
15 Other assets (describe ▶)					
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	38,762,026.	40,394,666.	47,088,617.		
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable	3,791,110.	3,357,167.		
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	3,791,110.	3,357,167.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
	24 Unrestricted and complete lines 24 through 26, and lines 30 and 31.				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
	27 Capital stock, trust principal, or current funds	0.	0.		
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
	29 Retained earnings, accumulated income, endowment, or other funds	34,970,916.	37,037,499.		
	30 Total net assets or fund balances	34,970,916.	37,037,499.		
	31 Total liabilities and net assets/fund balances	38,762,026.	40,394,666.		

## 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	34,970,916.
2 Enter amount from Part I, line 27a	2	2,066,583.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	37,037,499.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	37,037,499.

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

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e	13,357,914.	12,058,027.	1,299,887.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			1,299,887.

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,299,887.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	4,192,840.	41,378,238.	.101330
2016	8,137,836.	32,744,715.	.248524
2015	7,638,216.	25,470,219.	.299888
2014	6,157,985.	23,431,192.	.262811
2013	1,490,588.	16,750,121.	.088990

2 Total of line 1, column (d)	2	1.001543
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.200309
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	44,174,472.
5 Multiply line 4 by line 3	5	8,848,544.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	27,120.
7 Add lines 5 and 6	7	8,875,664.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	4,549,395.

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SHORT TERM	P		
b	LONG TERM	P		
c	STONEHILL INSTITUTIONAL PARTNERS	P		
d	STONEHILL INSTITUTIONAL PARTNERS	P		
e	STONEHILL INSTITUTIONAL PARTNERS	P		
f	LBIE - REDEMPTION FROM STONEHILL	P		
g	BOOK GAIN ON TENET HEALTHCARE CORP STK LESS THAN	D		
h	CAPITAL GAINS DIVIDENDS			
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,440,119.		5,861,922.	-421,803.
b 6,911,810.		6,192,370.	719,440.
c 3,362.		3,362.	0.
d 39,264.			39,264.
e 883,285.			883,285.
f 44,772.		373.	44,399.
g			0.
h 35,302.			35,302.
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-421,803.
b			719,440.
c			0.
d			39,264.
e			883,285.
f			44,399.
g			0.
h			35,302.
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	1,299,887.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	54,241.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	54,241.
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	54,241.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	66,556.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	20,000.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	86,556.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	32,315.	
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax	11	0.	
			32,315.   Refunded

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. CT, OH		
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	

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**Part VII-A** Statements Regarding Activities (continued)

- 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions
- 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
- 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?

	Yes	No
11		X
12		X
13	X	

Website address **WILSONSHEEHAN.ORG**

- 14 The books are in care of **LORRAINE WILSON** Telephone no. **203-459-2703**  
 Located at **931 OLD POST ROAD, FAIRFIELD, CT** ZIP+4 **06824**

- 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year

**15** N/A

- 16 At any time during calendar year 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

	Yes	No
16		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.

- 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?
- (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
- (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
- (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
- (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)?
- (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)

☐ Yes ☒ No☐ Yes ☒ No☐ Yes ☒ No☒ Yes ☐ No☐ Yes ☒ No☐ Yes ☒ No

	Yes	No
1a		X

- b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions  
 Organizations relying on a current notice regarding disaster assistance, check here

☐

1b		X
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- 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?

1c		X
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- 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?

☐ Yes ☒ No

If "Yes," list the years

- b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)

N/A

2b		
----	--	--

- c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.

- 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?

☐ Yes ☒ No

- b If "Yes," did it have excess business holdings in 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.)

N/A

3b		
----	--	--

- 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

4a		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?

4b		X
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**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

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

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

SEE STATEMENT 15

☒ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

☐ Yes ☒ No**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?**8** 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?☐ Yes ☒ 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.

(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
CHRISTOPHER E. WILSON	TRUSTEE			
931 OLD POST ROAD				
FAIRFIELD, CT 06824	3.00	0.	0.	0.
LORRAINE WILSON	TRUSTEE			
931 OLD POST ROAD				
FAIRFIELD, CT 06824	8.00	0.	0.	0.
MAUREEN S. MASSARO	EXECUTIVE DIRECTOR			
P.O. BOX 3085				
SPRINGFIELD, OH 45501	40.00	189,750.	9,488.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANDREA O'CONNOR	GRANTS MANAGER			
P.O. BOX 3085, SPRINGFIELD, OH 45501	40.00	56,125.	2,806.	0.

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

0

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**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

[illegible]

0

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

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

7  
2018.05020 WILSON SHEEHAN FOUNDATION 40000001



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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	44,780,191.
b	Average of monthly cash balances	1b	66,989.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	44,847,180.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	44,847,180.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	672,708.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	44,174,472.
6	Minimum investment return. Enter 5% of line 5	6	2,208,724.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	2,208,724.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	54,241.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	54,241.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,154,483.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,154,483.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,154,483.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	4,549,395.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	4,549,395.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,549,395.

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Form 990-PF (2018)

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

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
<b>1</b> Distributable amount for 2018 from Part XI, line 7				2,154,483.
<b>2</b> Undistributed income, if any, as of the end of 2018				
<b>a</b> Enter amount for 2017 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2018:				
<b>a</b> From 2013	1,157,443.			
<b>b</b> From 2014	4,992,533.			
<b>c</b> From 2015	6,374,954.			
<b>d</b> From 2016	6,543,790.			
<b>e</b> From 2017	2,191,002.			
<b>f</b> Total of lines 3a through e	21,259,722.			
<b>4</b> Qualifying distributions for 2018 from Part XII, line 4: ▶ \$	4,549,395.			
<b>a</b> Applied to 2017, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2018 distributable amount				2,154,483.
<b>e</b> Remaining amount distributed out of corpus	2,394,912.			
<b>5</b> Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus: Add lines 3f, 4c, and 4e. Subtract line 5	23,654,634.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
<b>8</b> Excess distributions carryover from 2013 not applied on line 5 or line 7	1,157,443.			
<b>9</b> Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	22,497,191.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2014	4,992,533.			
<b>b</b> Excess from 2015	6,374,954.			
<b>c</b> Excess from 2016	6,543,790.			
<b>d</b> Excess from 2017	2,191,002.			
<b>e</b> Excess from 2018	2,394,912.			

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

N/A

- 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(1)(3) or ☒ 4942(1)(5)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed:

**b** 85% of line 2a

**c** Qualifying distributions from Part XII,  
line 4 for each year listed

**d** Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

- 3** Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

**b** "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

~~(3) Largest amount of support from an exempt organization~~

**(4) Gross investment income**

**Part 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).)

SEE STATEMENT 16

- 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.

NONE

**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.

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

SEE STATEMENT 17

- 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**

Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ARTISTS FOR HUMANITY 100 W SECOND STREET BOSTON, MA 02127	NONE	PUBLIC	YOUTH ARTS ENTERPRISE	46,000.
BIG BROTHERS-BIG SISTERS OF SPRINGFIELD INC. 625 BURT ST SPRINGFIELD, OH 45505	NONE	PUBLIC	YOUTH EDUCATION/CAMP	21,000.
BOTTOM LINE 65 EAST WAKER PLACE SUITE 100 CHICAGO, IL 60601	NONE	PUBLIC	BOTTOM LINE - GENERAL OPERATING	50,000.
BREAKTHROUGH NEW YORK 123 WILLIAM STREET 4TH FLOOR NEW YORK, NY 10038	NONE	PUBLIC	MIDDLE SCHOOL PROGRAM	10,000.
BROOKLYN JESUIT PREP 560 STERLING PL BROOKLYN, NY 11238	NONE	PUBLIC	SUMMER LEADERSHIP PROGRAM AT FAIRFIELD UNIVERSITY FOR YOUTH FROM LOW-INCOME	20,000.
Total SEE CONTINUATION SHEET(S)				4,190,393.
b Approved for future payment				
ARTISTS FOR HUMANITY 100 W SECOND STREET BOSTON, MA 02127	NONE	PUBLIC	YOUTH ARTS ENTERPRISE	126,500.
FIVE POINTS CENTER FOR VISUAL ARTS 33 MAIN ST TORRINGTON, CT 06790	NONE	PUBLIC	FUNDING A 3 YEAR FULL-TIME STEP-DOWN DEVELOPMENT POSITION	150,000.
THE DREXEL FUNDS (DBA THE DREXEL FUND) 606 E, JUNEAU AVE # 510635 MILWAUKEE, WI 53203	NONE	PUBLIC	GENERAL OPERATIONS	500,000.
Total SEE CONTINUATION SHEET(S)				1,616,500.

Form 990-PF (2018)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CATHOLIC CENTRAL JR./SR. HIGH SCHOOL 1200 EAST HIGH STREET SPRINGFIELD, OH 45505	NONE	PUBLIC	EDUCATION	83,400.
CATHOLIC SOCIAL SERVICES 441 INDUSTRY DR COLUMBUS, OH 43204	NONE	PUBLIC	OUR LADY OF GUADALUPE CENTER/REPLICATOR STAY THE COURSE	150,000.
CENTER FOR HOMELESS INC 813 S. MICHIGAN ST SOUTH BEND, IN 46601	NONE	PUBLIC	EARLY CHILDHOOD INTERVENTION CENTER	42,800.
CHOOSING HOPE ADOPTIONS 616 N. LIMESTONE ST SPRINGFIELD, OH 45503	NONE	PUBLIC	LICENSED SOCIAL WORKER	49,795.
COLLIER COMMUNITY ABSTINENCE PROGRAM (CCAP) P.O. BOX 9488 NAPLES, FL 34101	NONE	PUBLIC	EDUCATION	60,000.
COMMUNITY HEALTH FOUNDATION 200 MEDICAL CENTER DRIVE SPRINGFIELD, OH 45504	NONE	PUBLIC	EARLY CHILDHOOD DENTAL HEALTH OUTREACH	6,335.
COMMUNITY IMPROVEMENT CORPORATION OF SPRINGFIELD & CLARK COUNTY OHIO 20 S LIMESTONE SUITE 100 SPRINGFIELD, OH 45502	NONE	PUBLIC	HOLIDAY IN THE CITY	5,000.
COVENANT UNITED METHODIST CHURCH 529 WEST JOHNNY LYTTLE AVENUE SPRINGFIELD, OH 45506	NONE	PUBLIC	EDUCATION	8,000.
CRADLES TO CRAYONS 1489 OLD SPRING VALLEY CT DAYTON, OH 45458	NONE	PUBLIC	CRADLES TO CRAYONS NEXT GENERATION GRANT	1,000.
CRISTO REY COLUMBUS OHIO 400 E TOWN STREET COLUMBUS, OH 43215	NONE	PUBLIC	EDUCATION	45,000.
<b>Total from continuation sheets</b>				<b>4,043,393.</b>

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CRISTO REY NETWORK 14 E JACKSON BLVD. SUITE 1200 CHICAGO, IL 60604	NONE	PUBLIC	COLLEGE INITIATIVES	831,110.
ELDERLY UNITED DBA UNITED SENIOR SERVICES 101 SOUTH FOUNTAIN AVE SPRINGFIELD, OH 45502	NONE	PUBLIC	125 WEST MAIN STREET PROJECT-CARE OF ELDERLY	75,000.
FIVE POINTS CENTER FOR VISUAL ARTS 33 MAIN ST TORRINGTON, CT 06790	NONE	PUBLIC	FUNDING A 3 YEAR FULL-TIME STEP-DOWN DEVELOPMENT POSITION	100,000.
HOOR CHILDREN INC. 36-11 12TH STREET (LOWER LEVEL) LONG ISLAND CITY, NY 11106	NONE	PUBLIC	CHILRDENS THERAPY SERVICES	40,000.
JEREMIAH PROGRAM 615 1ST AVENUE SUITE 210 MINNEAPOLIS, MN 55413	NONE	PUBLIC	EMPOWERING FAMILIES HEADED BY SINGLE WOMEN, TWO GENERATIONS AT A TIME	150,000.
LESOTHO NUTRITION INITIATIVE 115 MONTERAY AVE OAKWOOD, OH 45419	NONE	PUBLIC	LESOTHO NUTRITION INITIATIVE	5,000.
MARIAN UNIVERSITY 3200 COLD SPRINGS RD INDIANAPOLIS, IN 46222	NONE	PUBLIC	KLIPSCH EDUCATORS COLLEGE AT MARIAN UNIVERSITY	250,000.
MAYAN FAMILIES P.O. BOX 710400 SANTEE, CA 92072	NONE	PUBLIC	EDUCATION PROGRAM: PRESCHOOL NUTRITION CENTERS	125,000.
MERCY LEARNING CENTER OF BRIDGEPORT, INC. 637 PARK AVENUE BRIDGEPORT, CT 06604	NONE	PUBLIC	A VIEW OF THE HARBOR 2019 ENDOWMENT	25,000.
MID-OHIO FOOD BANK 3960 BROOKHAM DR GROVE CITY, OH 43123	NONE	PUBLIC	MID-OHIO FOOD BANK NEXT GENERATION GRANT	1,000.
Total from continuation sheets				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NORWALK GRASSROOTS TENNIS INC. 15 EASTWOOD RD NORWALK, CT 06851-1111	NONE	PUBLIC	BUILDING EDUCATION SUPPORT	55,000.
ON-THE-RISE 4177 DIALTON ROAD SPRINGFIELD, OH 45502	NONE	PUBLIC	CHARITABLE CONTRIBUTION - FILLING THE GAP	25,000.
PARTNERSHIP SCHOOLS 1011 FIRST AVE SUITE 1800 NEW YORK, NY 10022	NONE	PUBLIC	EDUCATION	150,000.
PER SCHOLAS 112 JEFFERSON AVE COLUMBUS, OH 43215	NONE	PUBLIC	PER SCHOLAS COLUMBUS IT JOB TRAINING	150,000.
RESCUEDOHIO PO BOX 382 NEW ALBANY, OH 45506	NONE	PUBLIC	NEXT GENERATION GRANT	1,000.
SAN MIGUEL ACADEMY OF NEWBURGH 241 LIBERTY STREET NEWBURGH, NY 12550	NONE	PUBLIC	EDUCATION	10,000.
SPRINGFIELD ARTS COUNCIL 117 SOUTH FOUNTAIN AVENUE SPRINGFIELD, OH 45501	NONE	PUBLIC	CHILDREN'S HANDS-ON LEARNING--2019 SUMMER ARTS FESTIVAL	6,070.
SPRINGFIELD CHRISTIAN YOUTH MINISTRIES 1500 BROADWAY ST. SPRINGFIELD, OH 45504	NONE	PUBLIC	SPRINGFIELD CHRISTIAN YOUTH MINISTRIES OPERATING SUPPORT	10,000.
SPRINGFIELD CITY SCHOOLS 1500 W. JEFFERSON STREET SPRINGFIELD, OH 45506	NONE	PUBLIC	PROJECT SPRINGBOARD PROGRAM	15,000.
SPRINGFIELD FAMILY YMCA 300 S LIMESTONE ST SPRINGFIELD, OH 45505	NONE	PUBLIC	YMCA AFTER-SCHOOL ENRICHMENT PROGRAM	5,000.
Total from continuation sheets				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SPRINGFIELD FOUNDATION 333 N LIMESTONE ST SUITE 201 SPRINGFIELD, OH 45503	NONE	PUBLIC	NATIONAL TRAIL PARKS AND RECREATION DISTRICT ENDOWMENT	5,000.
SPRINGFIELD MUSEUM OF ART 107 CLIFF PARK ROAD SPRINGFIELD, OH 45501	NONE	PUBLIC	CAPITAL CAMPAIGN/ART EDUCATION	10,000.
SPRINGFIELD SOUP KITCHEN 830 WEST MAIN STREET SPRINGFIELD, OH 45504	NONE	PUBLIC	SPRINGFIELD SOUP KITCHEN NEXT GENERATION	1,000.
SPRINGFIELD SYMPHONY ORCHESTRA ASSOCIATION 300 S FOUNTAIN AVE SPRINGFIELD, OH 45506	NONE	PUBLIC	STUDENTS AT THE SYMPHONY & SPRINGFIELD CHILDREN'S CHORUS	4,000.
ST. IGNATIUS SCHOOL 740 MANIDA STREET BRONX, NY 10474	NONE	PUBLIC	ST. IGNATIUS SCHOOL ADVANCING THE MISSION	20,000.
THE BLINKNOW FOUNDATION 35 KNOX HILL ROAD MORRISTOWN, NJ 07960	NONE	PUBLIC	GENERAL OPERATING SUPPORT	25,000.
THE CONSCIOUS CONNECT PO BOX 3081 SPRINGFIELD, OH 45501	NONE	PUBLIC	LAUNCHPAD TO LEARNING	15,000.
THE DREXEL FUNDS (DBA THE DREXEL FUND) 606 E, JUNEAU AVE # 510635 MILWAUKEE, WI 53203	NONE	PUBLIC	MULTIPLE SCHOOL INVESTMENTS AND GENERAL OPERATING	449,333.
THE GO PROJECT 50 COOPER SQUARE NEW YORK, NY 10003	NONE	PUBLIC	GO SCHOOL, GO SUMMER AND GO FAMILIES	25,000.
THE MATHILE INSTITUTE 241 TAYLOR ST SUITE 300 DAYTON, OH 45402	NONE	PUBLIC	MPower PROGRAM	50,000.
Total from continuation sheets				



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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
UNITED WAY OF CLARK, CHAMPAIGN AND MADISON COUNTIES 120 S CENTER ST SPRINGFIELD, OH 45502	NONE	PUBLIC	THE DOLLY PARTON IMAGINATION LIBRARY	5,000.
WELLSPRING 15 E. PLEASANT STREET SPRINGFIELD, OH 45506	NONE	PUBLIC	EDUCATION	150,000.
WITTENBERG UNIVERSITY 200 W WARD ST SPRINGFIELD, OH 45504	NONE	PUBLIC	EDUCATION - ENDOWMENTS AND ENGAGE SPRINGFIELD SUPPORT	11,500.
WORLD VISION P.O. BOX 9716 FEDERAL WAY, WA 98063-9716	NONE	PUBLIC	CHARITABLE CONTRIBUTION; WATER INITIATIVE AND INNOVATION INITIATIVE	500,000.
YEAR UP, INC. 45 MILK STREET BOSTON, MA 02109	NONE	PUBLIC	YEAR UP CHICAGO GROWTH & SUSTAINABLE	250,000.
YOUNG LIFE P.O. BOX 1465 SPRINGFIELD, OH 45501	NONE	PUBLIC	EDUCATION - GENERAL OPERATING	21,000.
BOSTON CENTER FOR ARTS 539 TREMONT ST BOSTON, MA 02116	NONE	PUBLIC	NEXT GENERATION GRANT	1,000.
THE MIRACLE LEAGUE OF CENTRAL OHIO 6259 COSGRAY RD DUBLIN, OH 43016	NONE	PUBLIC	NEXT GENERATION GRANT	1,000.
SECOND HARVEST FOOD BANK 701 E COLUMBIA ST SPRINGFIELD, OH 45503	NONE	PUBLIC	NEXT GENERATION GRANT	1,000.
SOUTH VIENNA ELEMENTARY 140 W MAIN ST SOUTH VIENNA, OH 45369	NONE	PUBLIC	SOUTH VIENNA ELEMENTARY LEADER IN ME	2,500.
Total from continuation sheets				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GIRLS ON THE RUN OF DAYTON PO BOX 752105 DAYTON, OH 45475	NONE	PUBLIC	FINANCIAL ASSISTANCE FOR CLARK COUNTY GIRLS ON THE RUN PARTICIPANTS	2,500.
CHILDREN'S RESCUE CENTER 1027 W. HIGH STREET SPRINGFIELD, OH 45505	NONE	PUBLIC	JEFFERSON STREET OASIS COMMUNITY GARDEN EXPANSION	3,000.
GREATER SPRINGFIELD ASSOCIATION OF FUNDRAISING PROFESSIONALS 270 S BROADMOOR BLVD SPRINGFIELD, OH 45504	NONE	PUBLIC	GENERAL OPERATING	750.
SPRINGFIELD ROTARY FOUNDATION 275 S LIMESTONE ST SPRINGFIELD, OH 45506	NONE	PUBLIC	EXCELLENCE IN TEACHING	3,800.
HELPING OUR YOUNG PEOPLE CONNECT WITH GOD 1391 ELIZABETH CT. SPRINGFIELD, OH 45503	NONE	PUBLIC	HOPE SKILLS, FITNESS, FOOD, AND NUTRITION FOR LIFE	2,500.
2ND & 7 FOUNDATION 7949 N HIGH ST COLUMBUS, OH 43235	NONE	PUBLIC	NEXT GENERATION GRANT	1,000.
NATIONWIDE CHILDREN'S HOSPITAL 700 CHILDREN'S DR COLUMBUS, OH 43205	NONE	PUBLIC	NEXT GENERATION GRANT	2,000.
Total from continuation sheets				

32-6266976

**3 Grants and Contributions Approved for Future Payment (Continuation)**

823635  
04-01-18





**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

- Attach to Form 990, Form 990-EZ, or Form 990-PF.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2018**

Name of the organization

**WILSON SHEEHAN FOUNDATION**

Employer identification number

**32-6266976**

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

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

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

**Special Rules**

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

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

Name of organization	Employer identification number
WILSON SHEEHAN FOUNDATION	32-6266976

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHRISTOPHER E AND LORRAINE WILSON 931 OLD POST ROAD FAIRFIELD, CT 06824	\$ 3,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	CHRISTOPHER E AND LORRAINE WILSON 931 OLD POST ROAD FAIRFIELD, CT 06824	\$ 1,033,320.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization	Employer identification number
<b>WILSON SHEEHAN FOUNDATION</b>	<b>32-6266976</b>

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>2</u>	<u>27,460 SHARES OF TENET HEALTHCARE CORP STOCK</u> _____ _____ _____	\$ <u>1,033,320.</u>	<u>07/31/18</u>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____



Name of organization <b>WILSON SHEEHAN FOUNDATION</b>	Employer identification number <b>32-6266976</b>
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

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

FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT 1

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED (F) GAIN OR LOSS	DATE SOLD
SHORT TERM				PURCHASED		
	5,440,119.	5,861,922.	0.	0.	-421,803.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED (F) GAIN OR LOSS	DATE SOLD
LONG TERM				PURCHASED		
	6,911,810.	6,192,370.	0.	0.	719,440.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED (F) GAIN OR LOSS	DATE SOLD
STONEHILL INSTITUTIONAL PARTNERS				PURCHASED		
	3,362.	0.	0.	0.	3,362.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED (F) GAIN OR LOSS	DATE SOLD
STONEHILL INSTITUTIONAL PARTNERS				PURCHASED		
	39,264.	0.	0.	0.	39,264.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED PURCHASED	(E) DEPREC.	DATE ACQUIRED	(F) GAIN OR LOSS	DATE SOLD
STONEHILL INSTITUTIONAL PARTNERS	883,285.	0.	0.		0.		883,285.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED PURCHASED	(E) DEPREC.	DATE ACQUIRED	(F) GAIN OR LOSS	DATE SOLD
LBIE - REDEMPTION FROM STONEHILL	44,772.	373.	0.		0.		44,399.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED DONATED	(E) DEPREC.	DATE ACQUIRED	(F) GAIN OR LOSS	DATE SOLD
BOOK GAIN ON TENET HEALTHCARE CORP STK LESS THAN TAX GAIN-CONTRIBUTED STK	0.	627,634.	0.		0.		-627,634.	

CAPITAL GAINS DIVIDENDS FROM PART IV	35,302.
TOTAL TO FORM 990-PF, PART I, LINE 6A	675,615.

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME	60.	60.	
TOTAL TO PART I, LINE 3	60.	60.	

## FORM 990-PF

## DIVIDENDS AND INTEREST FROM SECURITIES

## STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CAPITAL GAIN					
DISTRIBUTIONS	35,302.	35,302.	0.	0.	
INTEREST INCOME	151,676.	0.	151,676.	149,555.	
OTHER TAX EXEMPT INCOME	256,153.	0.	256,153.	0.	
U.S. TRUST	524,129.	0.	524,129.	524,129.	
TO PART I, LINE 4	967,260.	35,302.	931,958.	673,684.	

## FORM 990-PF

## OTHER INCOME

## STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
STONEHILL INSTITUTIONAL PARTNERS	810,044.	939,482.	
TAX REFUND-STATE	8,120.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	818,164.	939,482.	

## FORM 990-PF

## LEGAL FEES

## STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	8,305.	0.		8,305.
TO FM 990-PF, PG 1, LN 16A	8,305.	0.		8,305.

## FORM 990-PF

## ACCOUNTING FEES

## STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING / TAX PREP	8,729.	0.		8,729.
TO FORM 990-PF, PG 1, LN 16B	8,729.	0.		8,729.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	192,957.	192,957.		0.
TO FORM 990-PF, PG 1, LN 16C	192,957.	192,957.		0.

FORM 990-PF	TAXES			STATEMENT 8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	15,238.	0.		15,238.
FEDERAL TAXES	73,833.	0.		0.
FOREIGN TAXES	8,107.	8,107.		0.
UBIT	0.	0.		0.
STATE TAXES	0.	0.		0.
TO FORM 990-PF, PG 1, LN 18	97,178.	8,107.		15,238.

FORM 990-PF	OTHER EXPENSES			STATEMENT 9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TELEPHONE	1,749.	0.		1,749.
COMPUTER AND INTERNET	3,307.	0.		3,307.
OFFICE	8,957.	0.		8,957.
PAYROLL EXPENSE	1,022.	0.		1,022.
401 (K) FEE	1,200.	0.		1,200.
MISCELLANEOUS	968.	0.		968.
WEBSITE SUPPORT	1,750.	0.		1,750.
ADVERTISING AND PROMOTION	95.	0.		95.
SPONSORSHIPS	16,839.	0.		16,839.
MEMBERSHIP DUES	13,032.	0.		13,032.
INTERN	1,288.	0.		1,288.
TO FORM 990-PF, PG 1, LN 23	50,207.	0.		50,207.

FORM 990-PF	CORPORATE STOCK	STATEMENT 10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
U.S. LARGE CAP EQUITIES	10,045,704.	15,040,369.
U.S. MID CAP EQUITIES	976,142.	1,075,680.
INTERNATIONAL EQUITIES	1,186,802.	1,446,180.
EMERGING MARKET EQUITIES	1,770,338.	2,039,306.
U.S. SMALL CAP EQUITIES	755,097.	806,604.
TOTAL TO FORM 990-PF, PART II, LINE 10B	14,734,083.	20,408,139.

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BONDS	7,103,001.	7,305,726.
TOTAL TO FORM 990-PF, PART II, LINE 10C	7,103,001.	7,305,726.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 12
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CASH EQUIVILENTS	COST	1,893,752.	1,893,752.
HEDGE FUNDS	COST	16,567,833.	17,385,003.
TOTAL TO FORM 990-PF, PART II, LINE 13		18,461,585.	19,278,755.

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FORM 990-PF      DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT      STATEMENT 13

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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
4 PIECE DESK UNIT	4,318.	3,959.	359.
CHAIRS (2)	3,565.	3,266.	299.
TABLE AND FILING CABINET	1,679.	1,540.	139.
PHONE, PRINTER, WIRELESS			
ROUTER	1,133.	1,133.	0.
COMPUTER	998.	998.	0.
LAPTOP	1,100.	1,100.	0.
HERMAN MILLER ERGONOMIC DESK			
CHAIR	889.	804.	85.
OIL PAINTINGS	743.	0.	743.
OIL PAINTINGS	1,778.	0.	1,778.
GRANT SOFTWARE	8,000.	8,000.	0.
OFFICE DESK - KAVANAUGH'S	1,259.	825.	434.
CONFERENCE TABLE & OFFICE DESK	3,582.	1,365.	2,217.
TOTAL TO FM 990-PF, PART II, LN 14	29,044.	22,990.	6,054.

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FORM 990-PF      LIST OF SUBSTANTIAL CONTRIBUTORS      STATEMENT 14  
PART VII-A, LINE 10

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NAME OF CONTRIBUTOR	ADDRESS
CHRIS & LORRAINE WILSON	931 OLD POST ROAD FAIRFIELD, CT 06824

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT  
PART VII-B, LINE 5C

STATEMENT 15

GRANTEE'S NAME

THE MATHILE INSTITUTE

GRANTEE'S ADDRESS241 TAYLOR ST., SUITE 300  
DAYTON, OH 45402

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>	<u>VERIFICATION DATE</u>
50,000.	12/18/18	50,000.	01/31/19

PURPOSE OF GRANT

MPOWER NUTRITION SUPPLEMENT IN GUATEMALA.

DATES OF REPORTS BY GRANTEE

DECEMBER 31, 2018

ANY DIVERSION BY GRANTEE

NONE

RESULTS OF VERIFICATION

GRANT WAS USED FOR CHARITABLE PURPOSE AS INTENDED.



FORM 990-PF

PART XV - LINE 1A  
LIST OF FOUNDATION MANAGERS

STATEMENT 16

NAME OF MANAGER

CHRISTOPHER E. WILSON

LORRAINE WILSON

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 17

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MAUREEN MASSARO  
P.O. BOX 3085  
SPRINGFIELD, OH 45501

TELEPHONE NUMBER

937-244-7449

FORM AND CONTENT OF APPLICATIONS

GRANT APPLICATION PROCESS IS DONE ONLINE THROUGH GRANT MANAGEMENT SOFTWARE CONSISTING OF 3 STEPS: 1. COMPLETE AND SUBMIT ONLINE OUR LETTER OF INQUIRY (LOI) 2. REVIEW AND INVITATION TO APPLY ONLINE IF LOI FITS WITH OUR MISSION 3. DECISION ON WHETHER OR NOT APPLICATION HAS BEEN APPROVED. APPLICATIONS WILL INCLUDE CURRENT AUDITED FINANCIAL STATEMENTS AND COPY OF 501(C)(3) ACCEPTANCE LETTER AT A MINIMUM.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

REQUESTS NOT CONSIDERED FOR SCHOLARSHIPS; MASS FUNDING APPEALS; SPONSORSHIPS; ADVERTISING FOR FUNDRAISING EVENTS; AND GRANTS OR LOANS TO INDIVIDUALS.

# 2018 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
11	4 PICE DESK UNIT	02/04/13	SL	7.00		16	4,318.				4,318.	3,342.		617.	3,959.
12	CHAIRS (2)	02/04/13	SL	7.00		16	3,565.				3,565.	2,757.		509.	3,266.
13	TABLE AND FILING CABINET	02/04/13	SL	7.00		16	1,679.				1,679.	1,300.		240.	1,540.
15	PHONE PRINTER, WIRELESS ROUTER	02/04/13	SL	5.00		16	1,133.				1,133.	1,133.		0.	1,133.
16	COMPUTER	02/04/13	SL	5.00		16	998.				998.	998.		0.	998.
17	LAPTOP	05/24/13	SL	5.00		16	1,100.				1,100.	1,100.		0.	1,100.
28	HERMAN MILLER ERGONOMIC DESK CHAIR	03/11/13	SL	7.00		16	889.				889.	677.		127.	804.
39	OIL PAINTINGS	08/27/13	NC	.000	HY		743.				743.			0.	
40	OIL PAINTINGS	12/12/13	NC	.000	HY		1,778.				1,778.			0.	
41	GRANT SOFTWARE	03/18/14	SL	3.00		16	8,000.				8,000.	8,000.		0.	8,000.
52	OFFICE DESK - KAVANAUGH'S	12/05/14	SL	7.00		16	1,259.				1,259.	645.		180.	825.
53	CONFERENCE TABLE & OFFICE DESK	10/26/16	SL	7.00		16	3,582.				3,582.	853.		512.	1,365.
	* TOTAL 990-PF PG 1 DEPR						29,044.				29,044.	20,805.		2,185.	22,990.

828111 04-01-18

(D) - Asset disposed

\* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone