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Form 990-PF

Department of the Treasury  
Internal Revenue Service

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

▶ Do not enter social security numbers on this form as it may be made public.

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

OMB No. 1545-0052

2020

Open to Public Inspection

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation  
WILSON - WOOD FOUNDATION INC

Number and street (or P.O. box number if mail is not delivered to street address)  
2283 HARRIER WAY

City or town, state or province, country, and ZIP or foreign postal code  
NOKOMIS, FL 34275

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 foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 11,318,809

J Accounting method:

☐ Cash

☒ Accrual

☐ Other (specify)

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

A Employer identification number  
59-2243926

B Telephone number (see instructions)  
(941) 484-6549

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) (see instructions).)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)			
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B			
	3 Interest on savings and temporary cash investments			
	4 Dividends and interest from securities	240,609	240,609	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	52,614		
	b Gross sales price for all assets on line 6a 1,553,975			
	7 Capital gain net income (from Part IV, line 2)		52,614	
	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)				
12 Total. Add lines 1 through 11	293,223	293,223		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	102,000	20,400	81,600
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits	18,003	3,601	14,402
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	13,350	0	13,350
	c Other professional fees (attach schedule)	59,311	59,311	0
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	2,918	0	0
	19 Depreciation (attach schedule) and depletion	372	0	
	20 Occupancy	2,606	0	2,606
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)	4,454	0	4,454
	24 Total operating and administrative expenses. Add lines 13 through 23	203,014	83,312	116,412
	25 Contributions, gifts, grants paid	398,500		398,500
26 Total expenses and disbursements. Add lines 24 and 25	601,514	83,312	514,912	
	27 Subtract line 26 from line 12:			
	a Excess of revenue over expenses and disbursements	-308,291		
	b Net investment income (if negative, enter -0-)		209,911	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2020)

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	<b>1</b> Cash—non-interest-bearing . . . . .	25	25	25
	<b>2</b> Savings and temporary cash investments . . . . .	219,208	1,092,209	1,092,209
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .	11,895	8,977	8,977
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	8,137,951	8,496,650	8,496,650
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	2,384,625	1,712,553	1,712,553
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ 4,293 Less: accumulated depreciation (attach schedule) ▶ _____ 2,913	1,253	1,380	1,380
<b>15</b> Other assets (describe ▶ _____)	6,664	7,015	7,015	
<b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	10,761,621	11,318,809	11,318,809	
Liabilities	<b>17</b> Accounts payable and accrued expenses . . . . .	2,795		
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)	57,946	70,015	
	<b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .	60,741	70,015	
Net Assets or Fund Balances	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .	0	0	
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds	10,700,880	11,248,794	
	<b>29</b> <b>Total net assets or fund balances</b> (see instructions) . . . . .	10,700,880	11,248,794	
<b>30</b> <b>Total liabilities and net assets/fund balances</b> (see instructions) .	10,761,621	11,318,809		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return) . . . . .	<b>1</b>	10,700,880
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-308,291
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	868,274
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	11,260,863
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	12,069
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	<b>6</b>	11,248,794

<b>2</b>	Capital gain net income or (net capital loss)	<div style="display: inline-block; vertical-align: middle;"> <div style="display: inline-block; vertical-align: middle;"> <div style="display: inline-block; vertical-align: middle;">If gain, also enter in Part I, line 7</div> <div style="display: inline-block; vertical-align: middle;">If (loss), enter -0- in Part I, line 7</div> </div> </div>	<b>2</b>	52,614
<b>3</b>	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) (see instructions). If (loss), enter -0- in Part I, line 8	<div style="display: inline-block; vertical-align: middle;"> <div style="display: inline-block; vertical-align: middle;"> <div style="display: inline-block; vertical-align: middle;">If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8</div> </div> </div>	<b>3</b>	

<b>1</b> Reserved									
<b>(a)</b> Reserved		<b>(b)</b> Reserved		<b>(c)</b> Reserved		<b>(d)</b> Reserved			
<b>2</b> Reserved . . . . .						<b>2</b>			
<b>3</b> Reserved. . . . .						<b>3</b>			
<b>4</b> Reserved . . . . .						<b>4</b>			
<b>5</b> Reserved . . . . .						<b>5</b>			
<b>6</b> Reserved . . . . .						<b>6</b>			
<b>7</b> Reserved . . . . .						<b>7</b>			
<b>8</b> Reserved , . . . .						<b>8</b>			

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

<b>1a</b>	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>b</b>	Reserved.	<b>1</b>	2,918
<b>c</b>	All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0
<b>3</b>	Add lines 1 and 2.	<b>3</b>	2,918
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-.	<b>5</b>	2,918
<b>6</b>	Credits/Payments:		
<b>a</b>	2020 estimated tax payments and 2019 overpayment credited to 2020	<b>6a</b>	11,895
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>	0
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	0
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>	0
<b>7</b>	Total credits and payments. Add lines 6a through 6d.	<b>7</b>	11,895
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached.	<b>8</b>	0
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> .	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> .	<b>10</b>	8,977
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2021 estimated tax</b> 8,977 <b>Refunded</b>	<b>11</b>	0

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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?	<b>1a</b>	No
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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.</i>	<b>1b</b>	No
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?	<b>1c</b>	No
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation. ► \$ 0 <b>(2)</b> On foundation managers. ► \$ 0		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	<b>2</b>	No
<b>3</b> 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? <i>If "Yes," attach a conformed copy of the changes</i>	<b>3</b>	No
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?	<b>4a</b>	No
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	<b>4b</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	<b>5</b>	No
<b>6</b> 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?	<b>6</b>	Yes
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	<b>7</b>	Yes
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ► FL		
<b>b</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? <i>If "No," attach explanation.</i>	<b>8b</b>	Yes
<b>9</b> 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 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	<b>9</b>	No
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	<b>10</b>	No

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

<b>11</b>	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. . . . .	<b>11</b>		<b>No</b>
<b>12</b>	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 . . . . .	<b>12</b>		<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	<b>13</b>	<b>Yes</b>	
<b>14</b>	The books are in care of ▶ <u>SUSAN WOOD EXECUTIVE DIRECTOR</u> Telephone no. ▶ <u>(941) 484-6549</u>			
	Located at ▶ <u>2283 HARRIER WAY NOKOMIS FL</u> ZIP+4 ▶ <u>34275</u>			
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here . . . . . <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶ <b>15</b>			
<b>16</b>	At any time during calendar year 2020, 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? . . . . .	<b>16</b>	<b>Yes</b>	<b>No</b>
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

**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
<b>1a</b>	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? ( <b>Exception.</b> 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>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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 . . . . . <input type="checkbox"/>	<b>1b</b>	<b>No</b>
<b>c</b>	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 2020? . . . . . <input type="checkbox"/>	<b>1c</b>	<b>No</b>
<b>2</b>	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)):		
<b>a</b>	At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions.) . . . . . <input type="checkbox"/>	<b>2b</b>	
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
<b>3a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If "Yes," did it have excess business holdings in 2020 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 2020.) . . . . . <input type="checkbox"/>	<b>3b</b>	
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	<b>No</b>
<b>b</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 2020?	<b>4b</b>	<b>No</b>

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

<b>5a</b>	During the year did the foundation pay or incur any amount to:		<b>Yes</b>	<b>No</b>
(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 <b>any</b> 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 . . . . .		<b>5b</b>	
	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? . . . . . If "Yes," attach the statement required by Regulations section 53.4945–5(d).	<input type="checkbox"/> Yes <input type="checkbox"/> No		
<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>6b</b>	<b>No</b>
<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>7b</b>	
<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 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**

<b>1 List all officers, directors, trustees, foundation managers and their compensation. See instructions</b>				
(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
GEORGE FRALEY 2283 HARRIER WAY NOKOMIS, FL 34275	VICE PRESIDENT 5.00	0	0	0
SUSAN WOOD 2283 HARRIER WAY NOKOMIS, FL 34275	SECRETARY/TREASURER 40.00	102,000	10,200	0
THOMAS AFAESSLER 2283 HARRIER WAY NOKOMIS, FL 34275	PRESIDENT 5.00	0	0	0
LORI B COOPER 2283 HARRIER WAY NOKOMIS, FL 34275	DIRECTOR 5.00	0	0	0
<b>2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."</b>				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
<b>Total number of other employees paid over \$50,000.</b> . . . . .				<b>0</b>

**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
NONE		
Total number of others receiving over \$50,000 for professional services.		0

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

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

1	Expenses

**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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 . . . . . ►	0

**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>	9,768,348
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	630,463
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	10,398,811
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	10,398,811
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	155,982
<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>	10,242,829
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	512,141

**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>	512,141
<b>2a</b>	Tax on investment income for 2020 from Part VI, line 5. . . . .	<b>2a</b>	2,918
<b>b</b>	Income tax for 2020. (This does not include the tax from Part VI.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	2,918
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	509,223
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	509,223
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . .	<b>7</b>	509,223

**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>	514,912
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<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>	514,912
<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>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	514,912

**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.



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

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
<b>1</b> Distributable amount for 2020 from Part XI, line 7				509,223
<b>2</b> Undistributed income, if any, as of the end of 2020:				
<b>a</b> Enter amount for 2019 only. . . . .			397,180	
<b>b</b> Total for prior years: 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2020:				
<b>a</b> From 2015. . . . .				
<b>b</b> From 2016. . . . .				
<b>c</b> From 2017. . . . .				
<b>d</b> From 2018. . . . .				
<b>e</b> From 2019. . . . .				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	0			
<b>4</b> Qualifying distributions for 2020 from Part XII, line 4: ► \$ <u>514,912</u>				
<b>a</b> Applied to 2019, but not more than line 2a			397,180	
<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 2020 distributable amount. . . . .				117,732
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0			
<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 2019. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020. . . . .				391,491
<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 2015 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> <b>Excess distributions carryover to 2021.</b> Subtract lines 7 and 8 from line 6a. . . . .	0			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2016. . . . .				
<b>b</b> Excess from 2017. . . . .				
<b>c</b> Excess from 2018. . . . .				
<b>d</b> Excess from 2019. . . . .				
<b>e</b> Excess from 2020. . . . .				

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling. . . . . ▶

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2020	(b) 2019	(c) 2018	(d) 2017	
<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)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<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 e-mail address of the person to whom applications should be addressed:

SUSAN WOOD EXECUTIVE DIRECTOR  
2283 HARRIER WAY  
NOKOMIS, FL 34275  
(941) 484-6549  
WWFND@VERIZON.NET

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

A SHORT (1-2 PAGE) LETTER SHOULD BE WRITTEN CONTAINING OFFICIAL NAME & PURPOSE OF THE ORGANIZATION, BRIEF DESC. & TIMETABLE OF PROJECTS, TOTAL EST. COST OF PROJ. & TENTATIVE SUPPORT SOUGHT. PROVIDE COPY OF TAX EXEMPT LETTER.

**c** Any submission deadlines:

LETTERS OF INQUIRY MUST BE MAILED BEFORE JUNE. FORMAL GRANT APPLICATION SUBMITTED BEFORE SEPTEMBER.

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

ONLY U.S. ORGS. WITH 501(C)3 AND 509 (A)(1), OR (2) STATUS CONSIDERED. NOT CONSIDERED ARE PROPOSALS FOR ENDOWMENT FUNDS, TRAVEL PROJECTS, SURVEYS FUND RAISING COSTS, RESEARCH, PROPOSALS FROM OTHER PRIVATE FOUNDATIONS, MULTIPLE YEAR, REQUESTS FOR EMERGENCY FUNDS TO ELIMINATE EXISTING DEFICITS. REQUESTS FROM NATIONAL ORGANIZATIONS ONLY IF FOR PROGRAMS ON A LOCAL LEVEL.

**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</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total</b> . . . . .			<b>3a</b>	398,500
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	0

Enter gross amounts unless otherwise indicated.

	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) (See instructions.)
<b>1</b> Program service revenue:					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>f</b> _____					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments. . . . .					
<b>3</b> Interest on savings and temporary cash investments . . . . .					
<b>4</b> Dividends and interest from securities. . . . .			14	240,609	
<b>5</b> Net rental income or (loss) from real estate:					
<b>a</b> Debt-financed property. . . . .					
<b>b</b> Not debt-financed property. . . . .					
<b>6</b> Net rental income or (loss) from personal property					
<b>7</b> Other investment income. . . . .					
<b>8</b> Gain or (loss) from sales of assets other than inventory . . . . .			18	52,614	
<b>9</b> Net income or (loss) from special events:					
<b>10</b> Gross profit or (loss) from sales of inventory					
<b>11</b> Other revenue: <b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>12</b> Subtotal. Add columns (b), (d), and (e). . . . .		0		293,223	0
<b>13 Total.</b> Add line 12, columns (b), (d), and (e). . . . . (See worksheet in line 13 instructions to verify calculations.)			<b>13</b>	<b>293,223</b>	

[illegible]

**Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

		Yes	No
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--	--	--

1a(1)		No
1a(2)		No

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<b>1b(1)</b>	<b>No</b>
--------------	-----------

<b>1b(2)</b>		<b>No</b>
--------------	--	-----------

<b>1b(3)</b>	<b>No</b>
--------------	-----------

<b>1b(4)</b>	<b>No</b>
--------------	-----------

<b>1b(5)</b>		<b>No</b>
--------------	--	-----------

<b>1b(6)</b>	<b>No</b>
--------------	-----------

<b>1c</b>		<b>No</b>
-----------	--	-----------

value  
ue

[illegible]

described in section 501(c) (other than section 501(c)(3)) or in section 527? . . . . . ☐ Yes ☒ No

☐ Yes ☒ No

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

\*\*\*\*\*

Title

(see instr.) ☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name  REBECCA U STONER	Preparer's Signature	Date	Check if self-employed ► <input type="checkbox"/>	PTIN  P00585910
Firm's name ► KERKERING BARBERIO & CO				Firm's EIN ► 59-1753337
Firm's address ► PO BOX 49348  SARASOTA, FL 342306348				Phone no. (941) 365-4617

Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
ACADEMY AT GLENGARY INC 1819 GLENGARY ST SARASOTA, FL 34231	NONE	PC	HYBRID REHABILITATION PROGRAM	10,000
BIG BROTHERS BIG SISTERS OF THE SUNCOAST 1000 S TAMIAM TRAIL SUITE C VENICE, FL 34285	NONE	PC	READING BIGS/MENTORING ELEMENTARY SCHOOL PROGRAM	16,000
BOYS & GIRLS CLUBS OF MANATEE COUNTY INC 5236 30TH STREET WEST BRADENTON, FL 34207	NONE	PC	TEEN CLUB PROGRAM	16,000
<b>Total . . . . . ▶ 3a</b>				398,500

**Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
BOYS & GIRLS CLUB OF SARASOTA COUNTY INC 3130 FRUITVILLE RD SARASOTA, FL 34237	NONE	PC	SCHOLARSHIP SUPPORT FOR ROY MCBEAN CENTER	10,000
CHILD PROTECTION CENTER INC 720 SOUTH ORANGE AVE SARASOTA, FL 34236	NONE	PC	VISITATION PROGRAM	10,000
CHILDREN FIRST INC 1723 N ORANGE AVE SARASOTA, FL 34234	NONE	PC	COMPREHENSIVE CHILDREN/FAMILY SERVICES	20,000
<b>Total . . . . . ▶ 3a</b>				398,500

Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
COMMUNITY ASSISTED AND SUPPORTED LIVING INC 1401 16TH ST SARASOTA, FL 34236	NONE	PC	LIFE SKILLS SUPPORT PROGRAM	32,000
COMMUNITY COALITION ON HOMELESSNESS INC 701 17TH AVENUE WEST BRADENTON, FL 34205	NONE	PC	DENTAL/GENERAL OPERATIONAL SUPPORT	25,000
EASTER SEALS SOUTHWEST FLORIDA INC 350 BRADEN AVE SARASOTA, FL 34243	NONE	PC	SUPPORT SERVICES	15,000
<b>Total . . . . . ▶ 3a</b>				398,500



Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
EXCHANGE CLUB FAMILY PARTNERSHIP CENTER 602 3RD STREET EAST BRADENTON, FL 34208	NONE	PC	PARENT EDUCATION PROGRAM	10,000
FLORIDA CENTER FOR EARLY CHILDHOOD INC 4620 17TH ST SARASOTA, FL 34235	NONE	PC	EARLY CHILDHOOD COURT PROGRAM	10,000
FORTY CARROTS OF SARASOTA INC 1500 S TUTTLE AVE SARASOTA, FL 34239	NONE	PC	MENTAL HEALTH SERVICES	10,000
<b>Total . . . . . ▶ 3a</b>				398,500

Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
FOUNDATION FOR DREAMS INC 16110 DREAM OAKS PLACE BRADENTON, FL 34212	NONE	PC	DREAM OAKS CAMP	10,000
GIRL SCOUTS OF GULFCOAST FLORIDA INC 4780 CATTLEMEN RD SARASOTA, FL 34233	NONE	PC	COMMUNITY TROOPS PROGRAM	10,000
GIRLS INCORPORATED OF SARASOTA COUNTY 201 S TUTTLE AVE SARASOTA, FL 34237	NONE	PC	SCHOLARSHIPS FOR GIRLS/FAMILY STRENGTHENING	15,000
<b>Total . . . . . ▶ 3a</b>				398,500

Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
GOOD SAMARITAN PHARMACY & HEALTH 2502 N TAMIAMI TR NOKOMIS, FL 34275	NONE	PC	CLINIC/PHARMACY SERVICES	15,000
HABITAT FOR HUMANITY INTERNATIONAL INC 280 ALLIGATOR DR VENICE, FL 34293	NONE	PC	HOME CONSTRUCTION-S SARASOTA COUNTY	15,000
INSTRIDE THERAPY INC1629 RANCH RD NOKOMIS, FL 34275	NONE	PC	HIPPOTHERAPY	5,000
<b>Total . . . . . ▶ 3a</b>				398,500

**Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
LITERACY COUNCIL OF SARASOTA INC 1750 17TH STREET BLDG K-3 SARASOTA, FL 34234	NONE	PC	ADULT/FAMILY LITERACY PROGRAM	15,000
LOVELAND CENTER INC 157 S HAVANA RD VENICE, FL 34292	NONE	PC	TRANSPORTATION SERVICES	17,500
MEALS ON WHEELS PLUS OF MANATEE INC 811 23RD AVE EAST BRADENTON, FL 34208	NONE	PC	ADULT DAY RESPITE/COVID MEAL PROGRAMS	25,000
<b>Total . . . . . ▶ 3a</b>				398,500

**Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
NEURO CHALLENGE FOUNDATION INC 722 APEX RD UNIT A SARASOTA, FL 34240	NONE	PC	PARKINSON PROGRAM SUPPORT	15,000
SENIOR FRIENDSHIP CENTERS INC 1888 BROTHER GEENEN WAY SARASOTA, FL 34236	NONE	PC	CAREGIVER OUTREACH VISION GROUP	15,000
SKY FAMILY YMCA INC701 CENTER RD VENICE, FL 34285	NONE	PC	PRESCHOOL SCHOLARSHIPS	12,000
<b>Total . . . . . ▶ 3a</b>				398,500

Form 990PF Part XV Line 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</b> <i>Paid during the year</i>				
TEEN COURT OF SARASOTA INC PO BOX 48927 SARASOTA, FL 34230	NONE	PC	CAMP XRAY/RISKY BEHAVIORS CLASSES	10,000
TIDEWELL HOSPICE INC 5955 RAND BLVD SARASOTA, FL 34238	NONE	PC	FAMILY GRIEF COUNSELING	10,000
WOMEN'S RESOURCE CENTER OF MANATEE INC 1926 MANATEE AVE WEST BRADENTON, FL 34205	NONE	PC	PROJECT UPLIFT PROGRAM	25,000
<b>Total . . . . . ▶ 3a</b>				398,500

**TY 2020 Accounting Fees Schedule****Name:** WILSON - WOOD FOUNDATION INC**EIN:** 59-2243926

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	13,350	0		13,350

**Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.**

## TY 2020 Depreciation Schedule

**Name:** WILSON - WOOD FOUNDATION INC

**EIN:** 59-2243926

### Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
CABINET	1986-12-01	500	500	SL	10.0000000000000	0	0		
LEATHER CHAIR	1985-10-01	150	150	SL	10.0000000000000	0	0		
OFFICE DESK	1986-12-01	1,500	1,500	SL	10.0000000000000	0	0		
HP PRINTER ALL IN ONE LASER WIRELESS	2013-01-26	260	260	SL	5.0000000000000	0	0		
DELL LATITUDE	2019-01-16	1,534	281	SL	5.0000000000000	307	0		
HIGH BACK EXECUTIVE CHAIR	2020-02-10	499		SL	7.0000000000000	65	0		



**TY 2020 Investments Corporate Bonds Schedule****Name:** WILSON - WOOD FOUNDATION INC**EIN:** 59-2243926**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ABBOTT LABS 2.55% 3/15/22 (002824BA7)	102,750	102,750
CAMPBELL SOUP 2.5% 8/2/22 (134429AY5)	103,206	103,206
DOLLAR GENERAL CORP 3.25% 04/15/23 (256677AC9)	105,840	105,840
GOOGLE INC 3.375% 2/25/24 (38259PAD4)	109,412	109,412
HOME DEPOT INC 2.625% 6/1/22 (437076BG6)	103,081	103,081
HUNTINGTON INC 2.3% 1/14/22 (446150AK0)	101,722	101,722
ISHARES 1-5 YR INV GRADE CORP BND ETF (IGSB)	40,274	40,274
KAISER FDN HOSPITAL 3.5% 4/1/22 (48305QAA1)	103,570	103,570
NVR INC 3.95% 09/15/22 (62944TAE5)	262,551	262,551
PAXAIR INC 2.2% 8/15/22 (74005PBB9)	102,586	102,586
QUALCOMM INC 3% 5/20/22 (747525AE3)	103,608	103,608
SOUTHERN CO 2.45% 10/1/23 (8426EPAA6)	157,331	157,331
VERIZON COMM INC 2.45% 11/1/22 (92343VBJ2)	103,391	103,391
WALGREENS BOOTS INC 3.3% 11/18/21 (931427AF5)	102,041	102,041
WELLS FARGO & CO 3.45% 2/13/23 (94974BFJ4)	111,190	111,190

TY 2020 Investments Corporate Stock Schedule

**Name:** WILSON - WOOD FOUNDATION INC  
**EIN:** 59-2243926

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
3M COMPANY (MMM)	122,353	122,353
ABBOTT LABS (ABT)	328,470	328,470
ABBVIE INC (ABBY)	171,440	171,440
AFLAC INC (AFL)	222,350	222,350
ALPHABET INC CL A (GOOGL)	262,896	262,896
AMAZON.COM INC (AMZN)	439,686	439,686
AMGEN INC (AMGN)	172,440	172,440
APPLE INC (AAPL)	530,760	530,760
BERKSHIRE HATHAWAY INC DELAWARE (BRK A)	347,815	347,815
CATERPILLAR (CAT)	182,020	182,020
CHEVRON CORP (CVX)	126,675	126,675
CISCO SYSTEMS (CSCO)	179,000	179,000
COCA-COLA CO (KO)	167,262	167,262
COSTCO WHOLESALE CORP (COST)	88,543	88,543
ECOLAB INC (ECL)	54,090	54,090
EMERSON ELECTRIC CO (EMR)	178,984	178,984
EXXON MOBIL CORP (XOM)	41,220	41,220
GENUINE PARTS CO (GPC)	251,075	251,075
HOME DEPOT INC (HD)	265,620	265,620
HONEYWELL INTERNATIONAL INC (HON)	239,288	239,288
INTEL CORP (INTC)	161,915	161,915
ISHARES CORE HIGH DIVIDEND (HOV)	263,010	263,010
JOHNSON & JOHNSON (JNJ)	204,594	204,594
JPMORGAN CHASE & CO (JPM)	190,605	190,605
MCDONALDS RESTAURANT (MCD)	236,038	236,038
MERCK & CO NEW (MRK)	204,500	204,500
MICROSOFT CORP (MSFT)	333,630	333,630
NEXTERA ENERGY (NEE)	246,880	246,880
NVIDIA CORP (NVDA)	219,324	219,324
PAYCHEX INC (PAYX)	158,406	158,406

## Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PHILIP MORRIS INTERNATIONAL INC (PM)	146,952	146,952
PROCTER & GAMBLE CO (PG)	212,189	212,189
RAYTHEON TECHNOLOGIES CORP (RTX)	76,873	76,873
TRUIST FINANCIAL CORP (TFC)	128,213	128,213
VANGUARD DIVIDEND APPRECIATION (VIG)	536,446	536,446
VANGUARD MID-CAP (VO)	206,770	206,770
VERIZON COMMUNICATIONS INC (VZ)	117,500	117,500
WALMART INC (WMT)	245,055	245,055
WALT DISNEY CO (DIS)	129,181	129,181
ZOETIS INC (ZTS)	106,582	106,582

**TY 2020 Land, Etc.  
Schedule****Name:** WILSON - WOOD FOUNDATION INC**EIN:** 59-2243926

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
CABINET	500	500	0	
OFFICE DESK	1,500	1,500	0	
HP PRINTER ALL IN ONE LASER WIRELESS	260	260	0	
DELL LATITUDE	1,534	588	946	
HIGH BACK EXECUTIVE CHAIR	499	65	434	

## TY 2020 Other Assets Schedule

**Name:** WILSON - WOOD FOUNDATION INC

**EIN:** 59-2243926

### Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INTEREST AND DIVIDENDS	6,664	7,015	7,015

**TY 2020 Other Decreases Schedule**

**Name:** WILSON - WOOD FOUNDATION INC  
**EIN:** 59-2243926

Description	Amount
UNREALIZED DEFERRED EXCISE TAX EXPENSE	12,069

**TY 2020 Other Expenses Schedule****Name:** WILSON - WOOD FOUNDATION INC**EIN:** 59-2243926**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	2,164	0		2,164
OFFICE	365	0		365
SUBSCRIPTIONS/PUBLICATIONS	1,678	0		1,678
BANK SERVICE CHARGES	120	0		120
POSTAGE	127	0		127

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TY 2020 Other Increases Schedule			
Name: WILSON - WOOD FOUNDATION INC			
EIN: 59-2243926			
Other Increases Schedule			
Description			Amount
UNREALIZED GAIN ON SECURITIES			868,274



**TY 2020 Other Liabilities Schedule****Name:** WILSON - WOOD FOUNDATION INC**EIN:** 59-2243926

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED EXCISE TAX PAYABLE	57,946	70,015

**TY 2020 Other Professional Fees Schedule****Name:** WILSON - WOOD FOUNDATION INC**EIN:** 59-2243926

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
INVESTMENT FEES	59,311	59,311		0

**TY 2020 Taxes Schedule**

**Name:** WILSON - WOOD FOUNDATION INC  
**EIN:** 59-2243926

**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	2,918	0		0