Form **990-PF**

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

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tation
be made public
www.irs gov/form990of.

	Inte	nal F	Ravenue Service Information about Fo	rm 990-PF and its separate	nstructions	is at www.ir.		Open to Public Inspection
	Foi	cal	endar year 2016 or tax year beginning API	R 25, 2016	, and e	ending	DEC 31, 201	6
			of foundation	A Employer identification	n number			
	THE CARROLL AND MARGUERITE WHEELER							
			UNDATION C/O SENDERO	82-712973	1			
	_		and street (or P O box number if mail is not delivered to stree	address)		Room/suite		*
			W. NOTTINGHAM DR.			300B	B Telephone number 210-930-94	400
						BOOR		
			town, state or province, country, and ZIP or foreign	postal code			C If exemption application is	pending, check here
	_		N ANTONIO, TX 78209					
	G	Chec	ck all that apply.	Initial return of a f	ormer public (charity	D 1 Foreign organization	ns, check here
			Final return	Amended return				
			X Address change	Name change			2 Foreign organizations m check here and attach or	eeting the 85% test
	Н	Chec	ck type of organization X Section 501(c)(3) e	xempt private foundation			E If private foundation st	
7	Г	-	_	Other taxable private found	ation	.1	under section 507(b)(1	
5	<u> </u>			ing method: X Cash	Accr	V	1	
7.			· · · · · · · · · · · · · · · · · · ·	•	ACCI	uai	F If the foundation is in a	[]
$\overline{\psi}$	-			ther (specify)	5 \		under section 507(b)(1)(B), check here
/	_	- \$		ımn (d) must be on cash	pasis)			
•	LP:	<u>art</u>	(The total of amounts in columns (b), (c) and (d) may not	(a) Revenue and		vestment	(c) Adjusted net	(d) Disbursements for charitable purposes
			necessarily equal the amounts in column (a)	expenses per books	inco	ome	income	(cash basis only)
		1	Contributions, gifts, grants, etc., received				N/A	
		2	. (,				
		3	Interest on savings and temporary cash investments					
		4	Dividends and interest from securities			·		
		Ι΄						
		Ι.	a Gross rents				-	
			Net rental income or (loss)	,			,	
	<u>a</u>	6	Net gain or (loss) from sale of assets not on line 10					
	ű		Gross sales price for all assets on line 6a					
	Revenue	7	Capital gain net income (from Part IV, line 2)			0.		1
	Œ	8	Net short-term capital gain				,	
		9	Income modifications					
		108	Gross sales less returns and allowances					
		Ι.	Less Cost of goods sold					1
			Gross profit or (loss)					
		l .	Other income					
				110				
-			Total Add lines 1 through 11	χ0.		0.		1
		13	Compensation of officers, directors, trustees, etc	\ 0.		0.		0.
		14	Other employee salaries and wages					
	(0	15	Pension plans, employee benefits					
	ses		Legal fees					
		b	Accountinging CEIVED					
	Exper	С	Interest MAY 1 5 2019					
	e.	17	Interest MAY 1 5 2019 0					
	Administrative	18	MAY 1 5 2019 0		-			
	str		1909					 ,
	Ē	19	Debrediation and depletion					<u> </u>
	Ę	20	Octupancy.					
3	۲	21	Travel, conferences, and meetings				<u> </u>	
2	and	22	Printing and publications	<u> </u>				
O	6	23	Other expenses					
-	Operating	24	Total operating and administrative					
١	ᇹ		expenses Add lines 13 through 23	0.		0.		0.
วี	σ̈́	25	Contributions, gifts, grants paid	0.			- ,	0
ר			Total expenses and disbursements.	- 0.				
j		20	•	0.		0.		
빛.			Add lines 24 and 25	U •		0.		U •
SCANNED JUL 1 5 2019		27	Subtract line 26 from line 12					1
Z		a	Excess of revenue over expenses and disbursements	_ 0.				
ي		b	Net investment income (if negative enter -0-)			0.	<u></u>	
<i>ي</i> در		C	Adjusted net income (if negative, enter -0-)	ts See			N/A	

THE CARROLL AND MARGUERITE WHEELER FOUNDATION C/O SENDERO Form 990-PF (2016) 82-7129734 Page 2 Beginning of year Balance Sheets Atlached schedules and amounts in the description column should be for end of year amounts only End of year (a) Book Value (b) Book Value (c) Fair Market Value 1 Cash - non-interest-bearing 2 Savings and temporary cash investments 3 Accounts receivable ► Less: allowance for doubtful accounts 4 Pledges receivable ▶ Less: allowance for doubtful accounts 5 Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 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 c Investments - corporate bonds 11 Investments - land buildings and equipment basis Less accumulated depreciation 12 Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment basis Less accumulated depreciation 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the ΣO. instructions Also, see page 1, item I) 0 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loans from officers, directors trustees and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe 0 0 23 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31 **Net Assets or Fund Balances** 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted $\triangleright | \overline{X} |$ Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 0 0 27 Capital stock, trust principal, or current funds 0. 0. 28 Paid-in or capital surplus, or land, bldg, and equipment fund ο. 0. 29 Retained earnings, accumulated income, endowment, or other funds 0. 0 30 Total net assets or fund balances 0. n 31 Total liabilities and net assets/fund balances

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	0.
2 Enter amount from Part I, line 27a	2	0.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	0.
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	I, column (b), line 30	0.

Form 990-PF (2016)

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	and Losses for Tax on			176) H	w acquired	(a) Data aggregat	/d\ Data ==Id		
(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.)					ow acquired Purchase Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)		
1a	·								
b NOI	NE	 							
C	 			-					
d	····					<u> </u>			
<u>e</u>	/f) Degraciation allowed	1 (-) (-)	at as ather bosis	<u> </u>	,	(h) Co:= == (l===)			
(e) Gross sales price	(f) Depreciation allowed (or allowable)		expense of sale			(h) Gain or (loss) (e) plus (f) minus (
a									
b									
C		ļ		_					
<u>d</u>		<u> </u>		-	 				
Complete only for assets showing	g gain in column (h) and owned by	v the foundation	n on 12/31/69			(I) Gains (Col. (h.) gain i	minus		
Complete only for accoust showing	(j) Adjusted basis		xcess of col. (I)	\dashv		ol (k), but not less than	-0-) or		
(i) F.M V as of 12/31/69	as of 12/31/69		r col (j), if any			Losses (from col. (f	1))		
a									
b		1		\neg					
С									
d									
е		\bot							
	∫ If gain, also ente	er in Part I, line	7	J	_				
! Capital gain net income or (net cap	oital loss) { If (loss), enter -	0- in Part I, line	e 7	<i></i> / -	2				
Net short-term capital gain or (loss		and (6) [.]							
If gain, also enter in Part I, line 8, c	column (c)				,				
If (loss), enter -0- in Part I, line 8 Part V Qualification Ur	nder Section 4940(e) fo	r Reduced	1 Tay on Net	Inve	stment In	come			
For optional use by domestic private	foundations subject to the section	4940(a) tax or	net investment in	come)			N/A		
f section 4940(d)(2) applies, leave thi	is nart hlank								
15 10(5)(2) applies, leave the	S part blank					ı			
Vas the foundation liable for the section			•	od?			Yes No		
"Yes," the foundation does not qualif Enter the appropriate amount in ea				atrioc					
(a)	(b)	111211 11111111111111111111111111111111	I I I I I I I I I I I I I I I I I I I			1	(d)		
Base period years Calendar year (or tax year beginning	A 400 - 44 - 40 - 40 - 40 - 40 - 40 - 40	stributions	Net value of nor	(c) ncharita	ble-use asset	Distribu	(d) ition ratio ded by col. (c))		
2015	9 111/					(66) (6) (10)	(66) (5) 631.662 59 661.(6))		
2014									
2013						•			
	1								
2012									
2012 2011									
2011						2			
2011 Total of line 1, column (d)	year base period - divide the total	on line 2 by 5,	or by the number (of years		2			
2011 Total of line 1, column (d)		on line 2 by 5,	or by the number of	of years		2 3			
2011 Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence	ce if less than 5 years		or by the number (of years	;				
2011 Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence	ce if less than 5 years		or by the number (of years	,				
Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence Enter the net value of noncharitable	ce if less than 5 years		or by the number (of years	;	3			
2011 Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence Enter the net value of noncharitable	ce if less than 5 years		or by the number of	of years		3			
2011 Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence Enter the net value of noncharitable Multiply line 4 by line 3	ce if less than 5 years e-use assets for 2016 from Part X,		or by the number (of years		3 4 5			
2011 Total of line 1, column (d) Average distribution ratio for the 5-	ce if less than 5 years e-use assets for 2016 from Part X,		or by the number (of years		3			
Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence Enter the net value of noncharitable Multiply line 4 by line 3 Enter 1% of net investment income	ce if less than 5 years e-use assets for 2016 from Part X,		or by the number of	of years		3 4 5			
2011 Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence Enter the net value of noncharitable Multiply line 4 by line 3	ce if less than 5 years e-use assets for 2016 from Part X,		or by the number of	of years		3 4 5			
Total of line 1, column (d) Average distribution ratio for the 5- the foundation has been in existence Enter the net value of noncharitable Multiply line 4 by line 3 Enter 1% of net investment income	ce if less than 5 years e-use assets for 2016 from Part X, e (1% of Part I, line 27b)		or by the number of	of years		3 4 5			

Page 3

THE CARROLL AND MARGUERITE WHEELER

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_	ort VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 49)48 - s	ee instr	uctio	ns)
1a	Exampt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1	,			
	Date of ruling or determination letter (attach copy of letter if necessary-see instructions)		<u>, , , , , , , , , , , , , , , , , , , </u>	. `	
þ	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%	1			0 .
•	of Part I, line 27b				
C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)				123
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			0.
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			0.
6	Credits/Payments.			-	<u> </u>
a	2016 estimated tax payments and 2015 overpayment credited to 2016				
b	Exempt foreign organizations - tax withheld at source	·			. '
C	Tax paid with application for extension of time to file (Form 8868)			•	
đ	Backup withholding erroneously withheld 6d 5				
	Total credits and payments Add lines 6a through 6d	7			0.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9			0.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10			
	Enter the amount of line 10 to be Credited to 2017 estimated tax	11			
	rt VII-A Statements Regarding Activities			13.	T
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in	1	<u> </u>	Yes	
	any political campaign?		1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?		1b	-	X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published	ed or			`
	distributed by the foundation in connection with the activities				$\frac{1}{X}$
	Did the foundation file Form 1120-POL for this year?		10		╀┷
đ	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation. \$\Bigs \text{\$0.} (2) \text{ On foundation managers } \Bigs \text{\$0.}\$			·	
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation				Ì
0	managers. > \$		<u> </u>		X
	Has the foundation engaged in any activities that have not previously been reported to the IRS?		<u> </u>	25.5	 ^
	If "Yes," attach a detailed description of the activities Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or				
J	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes				X
12	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a	_	X
	If "Yes," has it filed a tax return on Form 990-T for this year?	N/Z			
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	-1, -	5		Х
	If "Yes," attach the statement required by General Instruction T		"		
	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 legislation. 	aw we		١.	
	remain in the governing instrument?		6		X
	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		7		X
-	and the state of t				
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)		,	l	
	TX			` '	3.
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	N/A	A 8b	 -	
	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calend		\$ -		

year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

Form **990-PF** (2016)

Page 5

Pa	art VII-A: Statements Regarding Activities (continued)			
			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		Х
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)	12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ► THE FOUNDATION Telephone no ► 210 – 93	30-9	499	
	Located at ≥ 250 W. NOTTINGHAM DR., NO. 300B, SAN ANTONIO, TX ZIP+4 ►78			
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	N	/A	
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	2.30	- 75	1976.7
	foreign country		(194	100
Pa	art _k VII _F B] Statements Regarding Activities for Which Form 4720 May Be Required	1-32	· A	1 - 2.2
-,,	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	17.7	Yes	No
12	a During the year did the foundation (either directly or indirectly):	## i	5 TO 1	. Sec.
,,	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No	1	-0	200
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		3	1.04
	a disqualified person?	157		12
		1	1	
	(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? Yes X No		المراه والم	4.0
	(5) Transfer any income or assets to a disqualified person (or make any of either available		,	to ci
		1,1		1
		1/2/1	1.70	
	(6) Agree to pay money or property to a government official? (Exception Check "No"	3 -1		₹ (4)
	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 X No	4 1	*:-1	
		10 8 17	` ,<-!	111
Đ	of fany answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations		إنسنا	<u> </u>
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A	1b	1.72.17	VA 42 I
_	Organizations relying on a current notice regarding disaster assistance check here	, a 1		43.5
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected	_27		انيت
	before the first day of the tax year beginning in 2016?	1c	2 11 3	X 9271
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	in i	글램	1.5
	defined in section 4942(j)(3) or 4942(j)(5)).	1,1 1,2	- 1	,M 5
а	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? Yes X No	27 7 2	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
	•		149 46	
_	If "Yes," list the years , , , ,	1,20		11/6
D	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect	1372		133
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach	-	* ``` .	a 25. I
_	statement - see instructions.) N/A	2b	70.	ZTI
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	1 1 1	in it	3
٥.	0.416.64344	1 5 A	37	77
зa	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	Here and		377
	during the year?	A.	- C.	\$ 1 m
	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after	家園	√y	
	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	[瑟]	- " "	1
	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,	$\frac{\partial \mathcal{A}_{\mathcal{N}} \hat{\varphi}^{*}}{\partial t}$		47/A2.
	Form 4720, to determine if the foundation had excess business holdings in 2016) N/A	3b		
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<u> </u>	X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	TO 10		10
	had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b	ᆛ	X
	Foi	m 990	-PF (2016)

Page 6

Part VII-B Statements Regarding Activities for Which	Form 4720 May Be	Required (contin	nued)		
5a During the year did the foundation pay or incur any amount to.		<u></u>			
(1), Carry on propaganda, or otherwise attempt to influence legislation (sectio	es X No	- '			
(2) Influence the outcome of any specific public election (see section 4955); of					
any voter registration drive?		Y	es X No	, u	3
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Y	es X No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section					
4945(d)(4)(A)? (see instructions)		Y	es X No	<u>,</u>	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or	for		ľ.	ļ. _.
the prevention of cruelty to children or animals?	Y	es X No	,	Ì	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify uni	der the exceptions described	ın Regulations	1	· · · ˈ	·
section 53.4945 or in a current notice regarding disaster assistance (see instru	ictions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	ere		▶□		1 -
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi	rom the tax because it mainta	ined	-		
expenditure responsibility for the grant?	Ŋ	I/A 🔲 Y	es No		
If "Yes," attach the statement required by Regulations section 53 494	5-5(d)			,	` ``
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on			-],	
a personal benefit contract?		Y	es X No		· a
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		-	6b	X
If "Yes" to 6b, file Form 8870			Ī.		
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?	Y	es X No	,	
b If "Yes," did the foundation receive any proceeds or have any net income attribu	itable to the transaction?		N/A	7b	
Part VIII Information About Officers, Directors, Trust	ees, Foundation Ma	nagers, Highl	y		
Paid Employees, and Contractors					
1 List all officers, directors, trustees, foundation managers and their	,	Li VCampanastian		· · · · · ·	
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred	(e) Ex	pense it, other
. ,	to position	`enter'-0-)'	compensation	allow	ances
	TRUSTEE			}	
250 W NOTTINGHAM DR. #300B					
SAN ANTONIO, TX 78209	2.00	0.	0.	ļ	0.
	TRUSTEE]		ŀ	
250 W NOTTINGHAM DR. #300B		1	_		
SAN ANTONIO, TX 78209	2.00	0.	0.		0.
	TRUSTEE				
250 W NOTTINGHAM DR. #300B			_		_
SAN ANTONIO, TX 78209	2.00	0.	0.		0.
	Charles and the same and the same and the				
2 Compensation of five highest-paid employees (other than those inc	<u> </u>	enter "NONE."	(d) Contributions to	(a) Ev	22020
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	acconn	pense t, other
NONE	devoted to position		compensation	allow	ances
NONE					
	····				
		-			
Total number of other employees paid over \$50,000			•		
Total number of other employees paid over 450,000				000 DF	

THE CARROLL AND MARGUERITE WHEELER

FORM 990-PF (2016) FOUNDATION C/O SENDERO		/129/34 Page 7
Part VIII Information About Officers, Directors, Trustees, Found Paid Employees, and Contractors (continued)	dation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, en	iter "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		
L	total information and as the	
List the foundation's four largest direct charitable activities during the tax year. Include relevant standard or organizations and other beneficiaries served, conferences convened, research papers provided the conferences.	roduced, etc.	Expenses
1 N/A		
		•
2		
3	_	-
4	-	····
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year of	on lines 1 and 2	Amount
1 N/A		-
2		
All other program-related investments See instructions		
3		

0.

Total. Add lines 1 through 3

82-7129734 Page 8

Part X Minimum Investment Return (All domest	ic foundations must complete this part F	oreign foundations, see inst	ructions)
1 Fair market value of assets not used (or held for use) directly in car	rying out charitable, etc., purposes:		
a Average monthly fair market value of securities		1 <u>1a</u>	0.
b Average of monthly cash balances		1b	
c Fair market value of all other assets		1c	
d Total (add lines 1a, b, and c)		1d	0.
e Reduction claimed for blockage or other factors reported on lines 1	a 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	0.
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (fo	or greater amount, see instructions)	4	
5 Net value of noncharitable-use assets Subtract line 4 from line 3		5	0.
6 Minimum investment return Enter 5% of line 5	•	6	0.
Part XI Distributable Amount (see instructions) (Set foreign organizations check here and do not compared to the foreign organization of the foreign organization	ction 4942(j)(3) and (j)(5) private operating fou omplete this part.)	ndations and certain	·············
1 Minimum investment return from Part X, line 6		1	0.
2a Tax on investment income for 2016 from Part VI, line 5	2a		
b Income tax for 2016. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b	<u> </u>	2c	0.
3 Distributable amount before adjustments Subtract line 2c from line	1	3	0.
4 Recoveries of amounts treated as qualifying distributions		4	0.
5 Add lines 3 and 4		5	0.
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	0.
Part XII Qualifying Distributions (see instructions)		•	
1 Amounts paid (including administrative expenses) to accomplish ch	aritable, etc., purposes:		
a Expenses, contributions, gifts, etc - total from Part I, column (d), lir	ne 26	1a	0.
b Program-related investments - total from Part IX-B		1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in car	rying 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 or	n Part V, line 8, and Part XIII, line 4	4	0.
5 Foundations that qualify under section 4940(e) for the reduced rate			
income. Enter 1% of Part I, line 27b		5	0.
6 Adjusted qualifying distributions Subtract line 5 from line 4		6	0.
Note. The amount on line 6 will be used in Part V, column (b), in su 4940(e) reduction of tax in those years.	bsequent years when calculating whether the fo	oundation qualifies for the section	n

Form **990-PF** (2016)

Form 990-PF (2016)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI,				
line 7		**************************************	Acidement one confe	0.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only		' '''	0.	
b Total for prior years:				
- 		0.		
3 Excess distributions carryover, if any, to 2016				
a From 2011				
b From 2012				
c From 2013				
d From 2014	-			
e From 2015				ļ
f Total of lines 3a through e 4 Qualifying distributions for 2016 from				
Part XII, line 4: > \$				
a Applied to 2015, but not more than line 2a	4	- 1	0.	
b Applied to undistributed income of prior			·	
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus		· ·	<u> </u>	
(Election required - see instructions)	0.			
d Applied to 2016 distributable amount				0.
e Remaining amount distributed out of corpus	0.			· ·
5 Excess distributions carryover applied to 2016	0.			0.
(If an amount appears in column (d) the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:			,	
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable			- "	
amount - see instructions		0.		,
e Undistributed income for 2015 Subtract line				
4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2016 Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2017			** · · · · · · · · · · · · · · · · · ·	0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election			3	
may be required - see instructions)	0.			
8 Excess distributions carryover from 2011				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017.	_			
Subtract lines 7 and 8 from line 6a	0.			· ·
D Analysis of line 9.				
a Excess from 2012				}
b Excess from 2013				ŀ
d Excess from 2014				Ŀ
e Excess from 2016				1
6 EAG633 HOTH 20 10		<u></u> i		

THE CARROLL AND MARGUERITE WHEELER FOUNDATION C/O SENDERO

Form 990-PF (2016) FOUNDAT	ION C/O SEN	IDERO		82-71	.29734 Page
Part XIV Private Operating F	oundations (see in	structions and Part VI	I-A, question 9)	N/A	
1 a If the foundation has received a ruling of	r determination letter tha	t it is a private operating		· · · <u>- · · · · · · · · · · · · · · · ·</u>	
foundation, and the ruling is effective fo		· · · · · · · · · · · · · · · · · · ·	▶		
b Check box to indicate whether the found	dation is a private operati	ng foundation described	in section	4942(j)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	Ĭ.	Prior 3 years		1
income from Part I or the minimum	(a) 2016	(b) 2015	(c) 2014	(d) 2013	(e) Total
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				1	İ
			 		· · · · · · · · · · · · · · · · · · ·
e Qualifying distributions made directly					
for active conduct of exempt activities					
Subtract line 2d from line 2c 3 Complete 3a, b, or c for the			 		<u> </u>
alternative test relied upon			/		
a "Assets" alternative test - enter					
(1) Value of all assets			ļ- <i>/</i>		
(2) Value of assets qualifying			/		
under section 4942(j)(3)(B)(i)		ļ,	/	ļ	
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			i		
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)	/	<u>/</u>			
(3) Largest amount of support from	4				
an exempt organization					
(4) Gross investment income					
Part XV Supplementary Info			if the foundation	had \$5,000 or mo	ore in assets
at any time during the	ne year-see instr	uctions.)	N/A		
1 Information Regarding Foundation	•				
a List any managers of the foundation who	have contributed more t	han 2% of the total contr	ibutions received by the	foundation before the clos	e of any tax
year (but only if they have contributed m	ore than \$5,000) (See se	ection 507(d)(2))			
b List any managers of the foundation who			or an equally large portio	on of the ownership of a pa	rtnership or
other entity) of which the foundation has	a 10% or greater interes	t			
2 Information Regarding Contribution					
Check here $ ightharpoonup oxed{X}$ if the foundation on					
the foundation makes gifts, grants, etc. (s	see instructions) to indivi	duals or organizations ur	nder other conditions, co	implete items 2a, b, c, and	d
a The name, address, and telephone numb	er or e-mail address of th	ie person to whom applic	ations should be addres	sed ⁻	
b The form in which applications should be	submitted and informati	on and materials they sh	ould include		
c Any submission deadlines					
d Any restrictions or limitations on awards	such as by geographical	areas charitable fields l	ands of institutions or o	ther factors:	

Form 990-PF (2016) FOUNDATION C/O SENDERO

Part XV: Supplementary Information (continued)

Supplementary information				
3 Grants and Contributions Paid During the Y	ear or Approved for Future	Payment T		ļ
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	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
a Paid during the year				-
MONTE				
NONE				
			•	
				•
	·			lu
		,		İ
				· ·
•				
			 	-
				`
Total		1	► 3a	0.
b Approved for future payment		,		
				,
NONE				
	•			
	1			
•				
				,
·				
	İ			
Total			▶ 3b	0.
· · · · · · · · · · · · · · · · · · ·				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	(a)	ousiness income (b)	(C) Exclu-	d by section 512, 513, or 514 (d)	(e) Related or exempt
1 Program service revenue	Business code	Amount	sion code	Amount	function income
a		 -			-
b					-
C					
d					
e				· · · · · · · · · · · · · · · · · · ·	
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments					
4 Dividends and interest from securities		<u>.</u>			
5 Net rental income or (loss) from real estate			\bot		
a Debt-financed property					
b Not debt-financed property			<u> </u>		
6 Net rental income or (loss) from personal					
property			1 1		
7 Other investment income			 		
8 Gain or (loss) from sales of assets other					
than inventory			-		
9 Net income or (loss) from special events			├		
10 Gross profit or (loss) from sales of inventory			 		
11 Other revenue			1		
a	-		 		
b	-				<u> </u>
d	-		 	· · · · · · · · · · · · · · · · · · ·	
e	-		 		
12 Subtotal Add columns (b), (d), and (e)	- 	0.	 	0.	0.
13 Total Add line 12, columns (b), (d), and (e)	1		 	13	0.
(See worksheet in line 13 instructions to verify calculations)				.~_	
· · · · · · · · · · · · · · · · · · ·	A- Al A	aliaharan A. C		· · · · · · · · · · · · · · · · · · ·	
Part XVI-B Relationship of Activities	to the Accom	plisnment of Ex	kempt F	'urposes	
Line No. Explain below how each activity for which inc	ome is reported in co	olumn (e) of Part XVI-A	contribute	d importantly to the accom	plishment of
the foundation's exempt purposes (other than	n by providing funds	for such purposes)			
		***			<u> </u>
	<u>.</u>				
		 		 	
				· <u> </u>	
				· <u> </u>	
					
					
i					

FOUNDATION C/O SENDERO

Page 13 Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

	:										
1	1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of							İ	Yes	No	
the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?											
а	Transfe	rs from the reporting found	ation to a noncharitable e	exempt or	rganization of						
	(1) Cas	sh							1a(1)		X
	(2) Oth	er assets							1a(2)		Х
b	Other tra	ansactions									
	(1) Sale	es of assets to a noncharita	ble exempt organization						1b(1)		$\overline{\mathbf{x}}$
	(2) Pur	chases of assets from a no	ncharitable exempt organ	nization					1b(2)		Х
	(3) Rer	ital of facilities, equipment,	or other assets						1b(3)		Х
	(4) Rei	mbursement arrangements							1b(4)		X
	(5) Loa	ns or loan guarantees							1b(5)		Х
	(6) Per	formance of services or me	mbership or fundraising	solicitatio	ons				1b(6)		X
С		of facilities, equipment, ma							1c		Х
d	If the an	swer to any of the above is	"Yes," complete the follow	wing sche	edule. Column (b) should a	alwa	ys show the fair r	narket value of the goods, o	ther ass	ets.	
								or sharing arrangement, sh			
	column	(d) the value of the goods,	other assets, or services	received.							
(a)Li	ne no	(b) Amount involved	(c) Name of non	charitable	e exempt organization		(d) Description	of transfers, transactions, and s	haring arr	angeme	nts
				N/A				-			
							·				
			-								
		-									
					-						
											
								 .			
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	s the for	indation directly or indirect	ly affiliated with, or relate	d to, one	or more tax-exempt organ	nızatı	ions described				
		n 501(c) of the Code (other					.07.0 000011500	[_	Yes	X	No
		omplete the following sche							00		
						c) Description of relationship	p				
N/A											
						\dagger		· · · · · · · · · · · · · · · · · · ·			
						\top					
						+					
						+			-		
		r penalties of perjury. I declare the									_
Sign 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							return	he IRS di with the	preparei		
	Here TRUSTEE								Yes	see instr	No.
	Sig	nature of officer of trustee	10 10 -	<u></u>	Date	י ב	Title		1 103		No
		Print/Type preparer's nar	me Prej	parer's si	gnature	Da		Check If PTIN			
				1	1			self- employed			
Paid JOSIE BEHREND Josephin Salved 05/08/2019 PO							P00	715	390		
							Firm's EIN ► 42-07				
Use Only											
	•	Firm's address ▶ 190	26 RIDGEWOO	OD P	ARKWAY, SUIT	rF:	400	<u> </u>		_	
, and the second							828-	-628	1		
		5711		/				7 HOTE 110 (2 I O)	<u> </u>	0 4 0	<u>, , , , , , , , , , , , , , , , , , , </u>