Form 990-PF

## EXTENDED TO NOVEMBER 15, 2 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 for instructions and the latest information

€ De	epartment of the Treasury	social security numbers on t	his form as it may be m	ade public	ZU IO
Int	ernal Revenue Service Go to www ii	rs gov/Form990PF for instru		formation	Open to Public Inspection
_	or calendar year 2018 or tax year beginning	·	, and ending	A F1	
ľ	Name of foundation THE CARROLL AND MARCIER THE	מק זקקטא		A Employer identificatio	n number
	THE <u>CARROLL</u> AND MARGUERITE FOUNDATION C/O SENDERO	02 7120724			
_	dumber and street (or P O box number if mail is not delivered to street.		15 ( )	82-7129734	<u> </u>
4		address)	Room/suite	B Telephone number	100
_	250 W. NOTTINGHAM DR.		300B	210-930-94	
	City or town, state or province, country, and ZIP or foreign possan ANTONIO, TX 78209	ostal code		C If exemption application is i	pending, check here
G	Check all that apply: Initial return	Initial return of a form	mer public charity	D 1 Foreign organization	s, check here
	Final return	Amended return		l soloigh organization	o, oncon nord
	Address change	Name change		2 Foreign organizations me check here and attach or	eeting the 85% test,
H	Check type of organization X Section 501(c)(3) ex		$\ell \wedge \ell$	1	
Ï		Other taxable private foundation		E If private foundation sta under section 507(b)(1	
<u> </u>	Fair market value of all assets at end of year   J   Accounting	<del></del>	Accrual		
		ner (specify)	Accidal	F If the foundation is in a	
		in (d) must be on cash basis )	1	under section 507(b)(1	)(b), check here
	Part   Analysis of Revenue and Expenses			(-) (-)	(d) 0
L	(The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net	(0) Disbursements for charitable purposes
_	necessarily equal the amounts in column (a) )	SAPORIOGO POR DOURG			(cash basis only)
	1 Contributions, gifts, grants, etc., received			N/A	
1	2 Check X if the foundation is not required to attach Sch. 8 Interest on savings and temporary				<b> </b>
ĺ	3 cash investments				
1	4 Dividends and interest from securities				
	5a Gross rents				
	Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a		-		
3	b Gross sales price for all assets on line 6a 7 Capital gain net income (from Part IV, line 2)		0.		
٥	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)				
	11 Other income				
	12 Total. Add lines 1 through 11	<b>X</b> 0.	0.		
_	13 Compensation of officers, directors, trustees, etc	0.1	0.		0.
	14 Other employee salaries and wages	<del> </del>			-
	15 Pension plans, employee benefits				
ď	1 16a Logal food	-			<del>-</del>
OUL 0 9 2019 Operating and Administrative Expense	b Accounting fees				
90,	C Other professional fees		<del></del>		<del></del>
LL a	17 Interest RECEIVED				
Ž	17 Interest RECEIVED				
1	18 Taxes				-
<u> </u>	19 Dedress at ion MA depter 10 2019		· · · · · · · · · · · · · · · · · · ·		<u>_</u> _
<b>?</b>	18 Taxes 19 Degree attorn and septement 2019 20 Occurrency 21 Trains and response and most most		·		
7	21 Travel, conferences, and meetings—J				
ה ה	22 Printing an Orthodalions N, UT			· <u></u>	
> 2	23 Other expenses				
	24 Total operating and administrative			·	
	expenses Add lines 13 through 23	0.	0.	<u></u>	0.
, 0	25 Contributions, gifts, grants paid	0.			0.
j	26 Total expenses and disbursements				
불	Add lines 24 and 25	0.	0.		0.
<u>z</u> —	27 Subtract line 26 from line 12:				
Ύ.	a Excess of revenue over expenses and disbursements	0.			
	b Net investment income (if negative enter -0-)		0.		
,	C Adjusted not income (4 possible notes 0.)			N / A	

Form **990-PF** (2018)

# THE CARROLL AND MARGUERITE WHEELER FOUNDATION C/O SENDERO

Form 990-PF (2018)

82-7129734

Part II Balance Sheets Atlached schedules and amounts in the description		Balance Sheets   Attached schedules and amounts in the description	Beginning of year		of year		
	art	column should be for end-of year amounts only	(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	Piedges receivable ▶					
		Less allowance for doubtful accounts	· · · · · · · · · · · · · · · · · · ·				
	5	Grants receivable					
	٦	Receivables due from officers, directors, trustees, and other					
	ľ	disqualified persons					
	7	_					
	7	Other notes and loans receivable					
	١,	Less: allowance for doubtful accounts	<u> </u>				
Assets	8	Inventories for sale or use					
Ass	9	Prepaid expenses and deferred charges					
`	1	Investments - U.S. and state government obligations		<del></del>			
	1	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					
	Ì	instructions. Also, see page 1, item I)	0.	<b>l X</b> 0.	<b>I X</b> 0.		
_	17	Accounts payable and accrued expenses		* / \	/ \		
	18	Grants payable					
S	19	Deferred revenue					
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons					
<u>ā</u>		Mortgages and other notes payable					
Ë		Other liabilities (describe )	-				
	**	Other habilities (describe	·	<del></del>			
	23	Total liabilities (add lines 17 through 22)	0.	0.			
_	23	Total Irabilities (add lines 17 through 22)  Foundations that follow SFAS 117, check here		0.			
		· ·					
SS		and complete lines 24 through 26, and lines 30 and 31					
ances	į	Unrestricted					
_		Temporarily restricted					
Fund Ba	26	Permanently restricted  Foundations that do not follow SFAS 117, check here					
Ë	ľ	,					
		and complete lines 27 through 31.					
ţ	ı	Capital stock, trust principal, or current funds	0.	0.	<u></u>		
Net Assets or		Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.			
Ë	1	Retained earnings, accumulated income, endowment, or other funds	0.	0.			
ž	30	Total net assets or fund balances	0.	0.			
				_	j		
	31	Total liabilities and net assets/fund balances	0.	0.			
P	art	Analysis of Changes in Net Assets or Fund B	alances				
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line	30				
		t agree with end-of-year figure reported on prior year's return)	~~	11	0.		
	•	amount from Part I, line 27a		2	0.		
		increases not included in line 2 (itemize)		3	0.		
		nes 1, 2, and 3		- 3	0.		
		rases not included in line 2 (itemize)		<b>⊢</b>	0.		
			oluma (h) Jisa 20	5	<del></del>		
0	10(3)	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	numm (D), line 30	6	<u>U.</u>		

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(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 a		(d) Date sold (mo., day, yr.)	
<u>1a</u>								
	ONE					<del>-, -</del>		
<u>c</u>				<u> </u>	<del> </del>			
<u>d</u>		· · · · · · · · · · · · · · · · · · ·			ļ			
(e) Gross sales price	(f) [	Depreciation allowed (or allowable)		st or other basis expense of sale			nn or (loss (f) minus (	
_a								
<u>b</u>	<del> </del> -		-					
<u>c</u>	<del>                                     </del>			<del>-</del>				
<u>d</u>	+					_		
Complete only for assets show	ing gain in (	column (h) and owned by	.L the foundation	n on 12/31/69.		(I) Gains (Co	ol (h) nain	minus
(ı) FMV as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) E:	xcess of col. (1) r col. (j), if any	c	ol (k), but n		1 -0-) <b>o</b> r
_a	<u> </u>							
<u>b</u>			ļ					<del></del>
<u> </u>			-	·				
e e	<del>                                     </del>							
		C If goin, also onto	r in Dart I line	7	<del></del>			
2 Capital gain net income or (net o	capital loss)	{ If gain, also enter If (loss), enter -0	i iii Part I, iiile I- in Part I, line	, : 7	)   2			
3 Net short-term capital gain or (kg		`		•				
If gain, also enter in Part I, line 8			iu (0).					
If (loss), enter -0- in Part I, line I	3				] 3			
Part V. Qualification (	Jnder S	ection 4940(e) for	Reduced	Tax on Net	Investment Ir	come		
(For optional use by domestic priva	te foundatio	ons subject to the section	4940(a) tax or	net investment ir	ncome )			
If section 4940(d)(2) applies, leave	this part bla	nk.						
	-1 4040		<b>-</b>	<b>4</b> b b	- 40			
Was the foundation liable for the se If "Yes," the foundation doesn't qual				-	100 /			Yes X No
Enter the appropriate amount in			<u> </u>		ntries			<del></del>
(a) Base period years	T	(b)		[	(c)			(d)
Base period years Calendar year (or tax year beginn	ing in)	Adjusted qualifying dis	tributions	Net value of no	ncharitable-use asset	s (	Distrib col. (b) divi	utión ratio ded by col. (c))
2017			0.					.000000
2016			0.			0.		.000000
2015								
2014								
2013								
D. Tatal of logs 1. column (d)								.000000
<ul><li>2 Total of line 1, column (d)</li><li>3 Average distribution ratio for the</li></ul>	5-vaar bac	a pariod - divida the total (	an lina 2 by E i	O or by the aumb	or of years	2		.000000
the foundation has been in existing			on line 2 by 5	o, or by the hallo	ei ui years	3		.000000
the realisation has been in exist	51100 II 1033 I							***************************************
4 Enter the net value of noncharita	ble-use ass	ets for 2018 from Part X.	line 5			4		
		,						
5 Multiply line 4 by line 3						5		0.
6 Enter 1% of net investment inco	me (1% of F	Part I, line 27b)				6		0.
a Addison F. 10								•
7 Add lines 5 and 6						7		0.
8 Enter qualifying distributions from	m Part XII, I	line 4				8		0.
If line 8 is equal to or greater tha See the Part VI instructions	n line 7, che	eck the box in Part VI, line	1b, and comp	lete that part usin	g a 1% tax rate.			- <del></del>

### THE CARROLL AND MARGUERITE WHEELER

Form 990-PF (2018) FOUNDATION C/O SENDERO 82-7129734 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 and enter "N/A" on line 1. (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: b Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 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) Ō. 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 2 3 Add lines 1 and 2 3 0. Ō. 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 4 5 Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-0. 5 6 Credits/Payments a 2018 estimated tax payments and 2017 overpayment credited to 2018 0. 6a O. b Exempt foreign organizations - tax withheld at source 6b 0. c Tax paid with application for extension of time to file (Form 8868) 6с d Backup withholding erroneously withheld 7 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 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 11 Enter the amount of line 10 to be: Credited to 2019 estimated tax Refunded ▶ Part VII-A | Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in Yes No any political campaign? X 1a Х b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 1b 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? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation.  $\triangleright$  \$ 0. (2) On foundation managers  $\triangleright$  \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 If "Yes," attach a detailed description of the activities 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 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? X 5 If "Yes," attach the statement required by General Instruction T 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? 6 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 7 8a Enter the states to which the foundation reports or with which it is registered. See instructions. TΧ 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 86 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 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

Form 990-PF (2018)

Part VII-A   Statements Regarding Activities (continued)								
		Yes	No					
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of								
section 512(b)(13)? If "Yes," attach schedule. See instructions								
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		X					
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X						
Website address N/A								
14 The books are in care of ► THE FOUNDATION Telephone no. ► 210-9		<u>499</u>						
Located at ► 250 W. NOTTINGHAM DR., NO. 300B, SAN ANTONIO, TX ZIP+4 ►7	<u>8209</u>							
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		<b>_</b>	. []					
and enter the amount of tax-exempt interest received or accrued during the year	N	/A						
At any time during calendar year 2018, 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		<u> X</u>					
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the								
Fart VII-B   Statements Regarding Activities for Which Form 4720 May Be Required								
		Vaa	NI-					
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	$\vdash$	Yes	No					
1a During the year, did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes X No			l					
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)								
a disqualified person?		l	•					
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes X No			1					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes X No		ļ	1					
(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"	1 1	ł	ļ					
If the foundation agreed to make a grant to or to employ the official for a period after		l	- 1					
termination of government service, if terminating within 90 days.)			- 1					
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	1 1							
section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions N/A	1b							
Organizations relying on a current notice regarding disaster assistance, check here								
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		İ	- 1					
before the first day of the tax year beginning in 2018?	1c		X					
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation		1	$\neg$					
defined in section 4942(j)(3) or 4942(j)(5))	1	ĺ	- 1					
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			ł					
before 2018? Yes X No			1					
If "Yes," list the years ,,,	1 1		- 1					
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		- 1	- 1					
during the year?  Yes X No			1					
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			- 1					
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		İ						
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	$\dashv$	X					
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	78	$\dashv$	<del></del> -					
had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b	-	X					
	rm <b>990</b> -	-PF (						

Form 990-PF (2018) FOUNDATION C/O SENDERO	- 4700 M	<del></del>	82-71297	34	Page 6
Part VII-B Statements Regarding Activities for Which	Form 4720 May Be	Required (contil	nued)		
5a During the year, did the foundation pay or incur any amount to				Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	* **		es X No		
(2) Influence the outcome of any specific public election (see section 4955),			·   · ·		
any voter registration drive?			es X No	Į.	'
(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	on described in section		[`	1	# 21.0004#15
4945(d)(4)(A)? See instructions			es X No	}	-
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, or			1	
the prevention of cruelty to children or animals?		Y	es X No	,	1 }
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> of the transactions fail to qualify un	der the exceptions described	in Regulations	<u>                                     </u>		
section 53.4945 or in a current notice regarding disaster assistance? See instr	uctions		N/A	5b	
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 f	rom the tax because it mainta	nned			1 1
expenditure responsibility for the grant?	ľ	√I/A	es 🔲 No	1.	1 1
If "Yes," attach the statement required by Regulations section 53.4945-5(d)					4
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on			İ	
a personal benefit contract?	. , ,	□ Y	es X No		1 1
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?			6b	X
If "Yes" to 6b, file Form 8870			<u> </u>		+
7a At any time during the tax year, was the foundation a party to a prohibited tax s	shelter transaction?		es X No		
b If "Yes," did the foundation receive any proceeds or have any net income attribu			/_	7b	<del>                                     </del>
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$		r	- 11/11  -	<del>'"</del>  , ·	<del></del> ,
excess parachute payment(s) during the year?	pr,000,000 iii reiliulieration o		es X No	·	1 1
Part VIII Information About Officers, Directors, Trust	oos Foundation Ma			!•	<del>!</del>
Paid Employees, and Contractors	ees, roundation wa	anagers, nigni	У		
List all officers, directors, trustees, and foundation managers and t	heir compensation		<del></del>		
	(b) Title, and average	(c) Compensation	(d) Contributions to	(a) Ex	nense
(a) Name and address	hours per week devoted	(If not paid,	employee benefit plans and deferred	(e) Exp account	, other
SHELLY MCTEE	to position TRUSTEE	`enter'-0-)	compensation	allowa	nces
250 W NOTTINGHAM DR. #300B	IKOSIEE				
SAN ANTONIO, TX 78209	2 00				•
DONALD HAYNES	2.00	0.	0.	_	0.
	TRUSTEE				
	0.00		ا		_
SAN ANTONIO, TX 78209	2.00	0.	0.		0.
	TRUSTEE				
250 W NOTTINGHAM DR. #300B		_	_		
SAN ANTONIO, TX 78209	2.00	0.	0.		<u>0.</u>
		i			
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."			
(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	(e) Exp account	ense
	devoted to position	(C) Compensation	and deferred compensation	allowa	nces
NONE	-				
			ŀ		
		· · · · · · · · · · · · · · · · · · ·			
			}		
Total number of other employees paid over \$50,000			<b>P</b>		0
			Form	90-PF	
					,,

			11110001111	
FOUN	NOITAGN	C/0	SENDERO	

Part VIII Information About Officers, Directors, Trustees, Foundard Employees, and Contractors (continued)	dation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, en	ter "NONE "	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE	1-1/2	1-7
		İ
	<del></del>	<del></del>
	<del></del>	
		<del></del> -
Total comband of others recovered over CCO 000 for a of		
Total number of others receiving over \$50,000 for professional services    Part  X-A   Summary of Direct Charitable Activities		<u>▶</u> 0
		<u> </u>
List the foundation's four largest direct charitable activities during the tax year. Include relevant sta number of organizations and other beneficiaries served, conferences convened, research papers pi	tistical information such as the	Expenses
27/2	oudced, etc	·
1 N/A		
2		
3		
4		
PartiX-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		
Total. Add lines 1 through 3	<b>•</b>	0.
Total Title Miles Title Orgin o		

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<u>Έ</u>	ert X Minimum Investment Return (All domestic foundations must comple	te this part. Foreign four	ndations, see instructi	ons)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purpo	ses		
a	Average monthly fair market value of securities		1a	0.
	Average of monthly cash balances		1b	
C	Fair market value of all other assets	İ	1c	
đ	Total (add lines 1a, b, and c)		1d	0.
е	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	0.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instruction	ons)	4	
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	1	5	0.
6	Minimum investment return Enter 5% of line 5		6	0.
ĮP.	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) privations organizations, check here and do not complete this part )	e operating foundations an	d certain	
1	Minimum investment return from Part X, line 6		1	0.
2a	Tax on investment income for 2018 from Part VI, line 5			
b	Income tax for 2018. (This does not include the tax from Part VI.)			
C	Add lines 2a and 2b		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.	Ì	7	0.
P	art:XIII 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	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 carrying out charitable, etc., purpo	ses	2	
3	Amounts set aside for specific charitable projects that satisfy the			
а	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, lin	ie 4	4	0.
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	Ī	6	0.
	Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculatin	g whether the foundation q	ualifies 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	( <b>d)</b> 2018
1 Distributable amount for 2018 from Part XI,				2010
line 7	** ***********************************			0.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
<b>b</b> Total for prior years.				
3 Excess distributions carryover, if any, to 2018		0.		
a From 2013				
<b>b</b> From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from				
Part XII, line 4: ►\$ 0.				
a 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.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			\$
d Applied to 2018 distributable amount				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018	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				
	0.			
& Corpus Add lines 3f, 4c, and 4e Subtract line 5				, ,
b Prior years' undistributed income Subtract		0.		į
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 2017. Subtract line		-		·
4a from line 2a. Taxable amount - see instr			0.	*
f Undistributed income for 2018 Subtract				
lines 4d and 5 from line 1. This amount must	Ì	İ		
be distributed in 2019				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)	0.			}
8 Excess distributions carryover from 2013				
not applied on line 5 or line 7	0.		İ	
9 Excess distributions carryover to 2019				
Subtract lines 7 and 8 from line 6a	0.			1
10 Analysis of line 9.				
a Excess from 2014				!
b Excess from 2015				
c Excess from 2016				r ·
d Excess from 2017				•
e Excess from 2018				

THE CARROLL AND MARGUERITE WHEELER

Form 990-PF (2018) FOUNDATION C/O SENDERO 82-7129734 Page 18 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(j)(3) or 4942(1)(5) 2 a Enter the lesser of the adjusted net Tax year Prior 3 years (a) 2018 (b) 2017 (c) 2016 (d) 2015 (e) Total 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. Subtract line 2d from line 2c 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 i 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.) N/A 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. 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 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:

#### THE CARROLL AND MARGUERITE WHEELER

Form 990-PF (2018) FOUNDATION C/O SENDERO

Part XV Supplementary Information (continued)

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Supplementary information				
3 Grants and Contributions Paid During the	Year or Approved for Future	Payment	·	
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
a Paid during the year	or substantial contributor	recipient		<del></del>
• • • • • • • • • • • • • • • • • • •				
NONE				
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		-		
	-			
Total	<del>, , , , , , , , , , , , , , , , , , , </del>	I	<b>▶</b> 3a	0.
b Approved for future payment				
NONE				
NONE				
		Т		
		ļ		
		ļ		
Total			<b>▶</b> 3b	0.

Unrelated business income

Excluded by section 512, 513, or 514

#### Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelated business income		Exch	ided by section 512, 513, or 514	(e)		
1 Program service revenue	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income		
2			<del>                                     </del>				
<u> </u>			<u> </u>		_		
b			ļ				
C							
d							
e							
			_	-	- "		
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							
5 Net rental income or (loss) from real estate:							
a Debt-financed property					,		
	<u> </u>		-				
b Not debt-financed property				<del> </del>			
6 Net rental income or (loss) from personal							
property							
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		<u>-</u>					
11 Other revenue.							
	_						
<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)				13	0.		
(See worksheet in line 13 instructions to verify calculations )							
Part XVI-B Relationship of Activities to	the Acco	mnlishment of Ev	amn	t Purnoses			
relationship of Activities to	the Acct	omphamment of Ex	emp	t Fulposes			
Line No Explain below how each activity for which incom	e is reported i	n column (e) of Part XVI-A	contrib	uted importantly to the accom	plishment of		
▼ the foundation's exempt purposes (other than by					•		
		<del></del>					
					<del> </del>		
		<u> </u>	_				
				•			
		· · · · · · · · · · · · · · · · · · ·					
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	<del> </del>			<del></del> .			
					. <u> </u>		

FOUNDATION C/O SENDERO

Part XVI	Information R Exempt Organ		nsfers to a	and Transac	ctions ar	nd Relations	ships With No	ncharitable		.90
1 Did the	organization directly or ind	rectly engage in any	of the follows	ng with any other	organization	n described in sec	tron 501(c)		Yes	No
(other ti	han section 501(c)(3) orga	nizations) or in secti	on 527, relatır	ng to political orga	nizations?					
a Transfe	rs from the reporting found	lation to a noncharita	able exempt o	rganization of						
(1) Cas	sh			-				1a(1)		X
(2) Oth	ner assets							1a(2)	_	Х
	ansactions							11(-)		
(1) Sal	es of assets to a noncharita	able exempt organiza	ition					1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization										X
(3) Rental of facilities, equipment, or other assets										X
	mbursement arrangements							1b(3) 1b(4)	_	X
	ans or loan guarantees							1b(5)		X
	formance of services or me	emhershin or fundra	ieina ealiaitatii	nne				1b(6)	+	X
	of facilities, equipment, ma	•	•					1c	+	X
-	swer to any of the above is	•			) chould alw	ave chow the fair	market value of the		L	
	ces given by the reporting f								3612,	
	(d) the value of the goods,				ilainet value	iir ariy transactio	ii or snaring arrange	anient, snow in		
(a)Line no	(b) Amount involved			e exempt organiza	ation	(d) December	on of transfers, transaction			
(4)21110110	(b) / who dist in volved	(c) Name o	N/A	- Coompt organize	411011	(u) Description	on or transfers, transaction	ons, and sharing a	rangeme	nts
-		<del>                                     </del>	II/A			<del> </del>	<del> </del>			
	<del></del> -	<del> </del>				ļ				
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	undation directly or indirect			or more tax-exer	npt organiza	tions described				,
	n 501(c) (other than sectio		ction 527?					Yes	X	∫No
<b>b</b> If "Yes," o	complete the following sch									
	(a) Name of org	anization		(b) Type of orga	anization		(c) Description of re	lationship		
	N/A									
	er penalties of perjury, I declare to belief lit is true, correct, and com-							May the IRS of	discuss th	nis
Sign	Series It is troop, correct, and con	piete Deciaration of pre	aparer (other thai	n taxpayer) is based	4 <b>()</b>	ion of which prepare	r nas any knowledge	return with the	e prepare	er
Here	' '// / / / I	14 el		15.9	, 19	TRUST	ΞE	X Yes	'_	No
Sig	nature of officer or trustee			Date	-	Title				
	Print/Type preparer's na	me	Preparer's si	gnature	] [	Date	Check if	PTIN 7		
			1	. 0	, 1.	15 (00 (00 : 5	self- employed	1	\	
Paid	JOSIE BEHR	END	Goseph	in 15a1	had (	05/08/2019		P00715	390	
Preparer	Firm's name ► RSM	US LLP	$\mathcal{T}$			<u></u>	Firm's EIN ▶ 4			
<b>Use Only</b>			-					·		
	Firm's address ▶ 19	026 RIDGE	WOOD P	ARKWAY.	SUITE	400				
		N ANTONIO					Phone no (2:	10) 828	-628	₹1