

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 for instructions and the latest information.

OMB No 1545-0052
2018
Open to Public Inspection

For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018

Name of foundation THE WILKENS FAMILY FOUNDATION		A Employer identification number 47-5634424	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 3265		Room/suite	
		B Telephone number (see instructions) (802) 253-2876	
City or town, state or province, country, and ZIP or foreign postal code STOWE, VT 05672			
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 20,869,814		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(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)	2,753,234			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	524,036	524,036		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	301,669			
	b Gross sales price for all assets on line 6a	3,387,777			
	7 Capital gain net income (from Part IV, line 2)		301,669		
	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)	29	29			
12 Total. Add lines 1 through 11	3,578,968	825,734			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	7,000	3,500		3,500
	c Other professional fees (attach schedule)	113,352	113,352		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	16,747	3,002		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	278	0		278
	24 Total operating and administrative expenses. Add lines 13 through 23	137,377	119,854		3,778
	25 Contributions, gifts, grants paid	978,148			978,148
26 Total expenses and disbursements. Add lines 24 and 25	1,115,525	119,854		981,926	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	2,463,443				
b Net investment income (if negative, enter -0-)		705,880			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	1,237,465	442,550	442,550
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)	0	692,750	696,285
	b Investments—corporate stock (attach schedule)	12,967,112	15,534,328	16,278,330
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	3,467,903	3,466,295	3,452,649
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	17,672,480	20,135,923	20,869,814	
Liabilities	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 (attach schedule).			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0	0	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
29 Retained earnings, accumulated income, endowment, or other funds	17,672,480	20,135,923		
30 Total net assets or fund balances (see instructions)	17,672,480	20,135,923		
31 Total liabilities and net assets/fund balances (see instructions) .	17,672,480	20,135,923		

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	17,672,480
2 Enter amount from Part I, line 27a	2	2,463,443
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	20,135,923
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	20,135,923

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 3,387,777		3,086,108	301,669
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			301,669
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	301,669
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	857,400	19,685,562	0.043555
2016	372	17,324,686	0.000021
2015	0	8,392,259	0.000000
2014			
2013			

2 Total of line 1, column (d)	2	0.043576
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.014525
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	21,892,826
5 Multiply line 4 by line 3	5	317,993
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	7,059
7 Add lines 5 and 6	7	325,052
8 Enter qualifying distributions from Part XII, line 4	8	981,926

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

Table with 11 rows for excise tax calculations. Includes sub-rows 6a-6d for 2018 estimated tax payments. Total tax due is 1,841, with 1,841 refunded.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, 'Yes', and 'No' responses. Questions cover political activities, tax returns, and substantial contributors.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-13 regarding controlled entities, donor advised funds, and public inspection requirements.

14 The books are in care of DAVID WILKENS Telephone no (802) 253-2876

Located at PO BOX 3265 STOWE VT ZIP+4 05672

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

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in foreign countries.

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.

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions. Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions. **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 from the tax because it maintained expenditure responsibility for the grant? Yes No
If "Yes," attach the statement required by Regulations section 53.4945–5(d)

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** Yes No
If "Yes" to 6b, file Form 8870

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

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** Yes No

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year? Yes No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000. 0

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
TOCQUEVILLE SECURITIES LP 40 W 57TH STREET 19TH FLOOR NEW YORK, NY 10019	INVESTMENT ADVISOR	111,870
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	Expenses
1	
2	
3	
4	

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	20,922,461
b	Average of monthly cash balances.	1b	1,303,758
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	22,226,219
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	22,226,219
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	333,393
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	21,892,826
6	Minimum investment return. Enter 5% of line 5.	6	1,094,641

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

1	Minimum investment return from Part X, line 6.	1	1,094,641
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	7,059
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	7,059
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,087,582
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,087,582
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	1,087,582

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	981,926
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	981,926
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. See instructions.	5	7,059
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	974,867

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				1,087,582
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			974,148	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.				
d From 2016.				
e From 2017.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>981,926</u>				
a Applied to 2017, but not more than line 2a			974,148	
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.				7,778
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
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 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				1,079,804
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 (see instructions).	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				
e Excess from 2018.				

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 2018, 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) 2018	(b) 2017	(c) 2016	(d) 2015	
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					

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

a "Assets" alternative test—enter

(1) Value of all assets

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

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

c "Support" alternative test—enter

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

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

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

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

Part XVII

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of

- (1)** Cash.
- (2)** Other assets.

	Yes	No
1a(1)		No
1a(2)		No
b Other transactions		
(1) Sales of assets to a noncharitable exempt organization.		No
(2) Purchases of assets from a noncharitable exempt organization.		No
(3) Rental of facilities, equipment, or other assets.		No
(4) Reimbursement arrangements.		No
(5) Loans or loan guarantees.		No
(6) Performance of services or membership or fundraising solicitations.		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		No

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? Yes No

b If "Yes," complete the following schedule

(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.

Sign Here ▶ ***** 2019-05-28 *****

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instr)? Yes No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	GREGORY BLACK		2019-05-28		P00295621
	Firm's name ▶	COHNREZNICK LLP			Firm's EIN ▶
	Firm's address ▶	1301 AVENUE OF THE AMERICAS NEW YORK, NY 10019			Phone no (212) 297-0400

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
FRANK WILKENS III PO BOX 3265 STOWE, VT 05672	PRESIDENT 0 25	0	0	0
STEPHEN M WILKENS PO BOX 3265 STOWE, VT 05672	VICE PRESIDENT 0 25	0	0	0
DANIEL P WILKENS PO BOX 3265 STOWE, VT 05672	SECRETARY 0 25	0	0	0
DAVID T WILKENS PO BOX 3265 STOWE, VT 05672	TREASURER 0 25	0	0	0
SANDRA G WILKENS PO BOX 3265 STOWE, VT 05672	DIRECTOR 0 25	0	0	0
KAREN C WILKENS PO BOX 3265 STOWE, VT 05672	DIRECTOR 0 25	0	0	0
MOLLY A PINDELL PO BOX 3265 STOWE, VT 05672	DIRECTOR 0 25	0	0	0

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)				
a <i>Paid during the year</i>				
BREAST FRIENDS 14050 SW PACIFIC HWY SUITE 201 TIGARD, OR 97224	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	12,000
EDUCATION FOUNDATION OF PALM BEACH COUNTY INC 3300 FOREST HILL BLVD BUILDING C-141 WEST PALM BEACH, FL 33406	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	48,907
FEEDING AMERICA 35 E WACKER DR SUITE 2000 CHICAGO, IL 60601	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	22,761
Total ▶ 3a				978,148

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)				
a <i>Paid during the year</i>				
HOPE ON HAVEN HILL PO BOX 1272 ROCHESTER, NH 08687	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	195,630
HOUSE OF RUTH 5 THOMAS CIRCLE NW WASHINGTON, DC 20005	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	11,380
JULIETTE'S HOUSE 1075 SW CEDARWOOD AVE MCMINNVILLE, OR 97128	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	5,630
Total ▶ 3a				978,148

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
LAMOILLE RESTORATIVE CENTER PO BOX 148 HYDE PARK, VT 05655	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	56,902
LORDS PLACE INC 2808 NORTH AUSTRALIAN AVE WEST PALM BEACH, FL 33407	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	48,907
LUND FAMILY CENTER INC PO BOX 4009 BULINGTON, VT 054064009	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	59,065
Total				978,148



3a

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)				
a <i>Paid during the year</i>				
NORTH CENTRAL VERMONT RECOVERY CENTER 275 BROOKLYN ST 2 MORRISVILLE, VT 05661	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	45,522
NORTHERN NEW ENGLAND SALVATION ARMY PO BOX 3647 PORTLAND, ME 04104	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	79,663
PALM BEACH COUNTY LITERACY COALITION INC 3651 QUANTUM BLVD BOYNTON BEACH, FL 33426	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	48,907
Total ▶ 3a				978,148

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)				
a <i>Paid during the year</i>				
RAPHAEL HOUSE OF PORTLAND 4110 SE HAWTHORNE BLVD PORTLAND, OR 97214	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	50,000
SPECTRUM INC31 ELMWOOD AVE BULINGTON, VT 05401	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	34,141
THE AMERICAN RED CROSS PO BOX 37839 BOONE, IA 500370839	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	81,826
Total ▶ 3a				978,148

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)				
a <i>Paid during the year</i>				
THE FRIENDLY HOUSE 2617 NW SAVIER ST PORTLAND, OR 97210	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	50,000
TRANSITIONS PROJECTS OF PORTLAND OREGON 665 NW HOYT ST PORTLAND, OR 97209	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	60,000
TUALITY HEALTHCARE FOUNDATION 335 SE 8TH AVE HILLSBORO, OR 97123	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	10,000
Total ▶ 3a				978,148

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)				
a <i>Paid during the year</i>				
YAMHILL COMMUNITY ACTION PARTNERSHIP 1317 NE DUSTIN COURT MCMINNVILLE, OR 97128	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	8,000
YWCA OF PALM BEACH COUNTY 1016 NORTH DIXIE HWY WEST PALM BEACH, FL 33401	NONE	PC	AN UNRESTRICTED GRANT TO FURTHER DONEE'S EXEMPT PURPOSE	48,907
Total ▶ 3a				978,148

TY 2018 Accounting Fees Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COHNREZNICK LLP	7,000	3,500		3,500

TY 2018 Investments Corporate Stock Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	15,534,328	16,278,330

TY 2018 Investments Government Obligations Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424**US Government Securities - End
of Year Book Value:**

692,750

**US Government Securities - End
of Year Fair Market Value:**

696,285

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2018 Investments - Other Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
REITS	FMV	387,203	288,552
EXCHANGE TRADED FUNDS	FMV	3,079,092	3,164,097

TY 2018 Other Expenses Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE SUPPLIES AND EXPENSE	278	0		278

TY 2018 Other Income Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
SUBSTITUTE PAYMENT IN LIEU OF DIVIDENDS	22	22	22
CREDIT CARD REWARDS	7	7	7

TY 2018 Other Professional Fees Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TOCQUEVILLE SECURITIES L P	113,352	113,352		0

**TY 2018 Substantial Contributors
Schedule****Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424

Name	Address
MAUREEN WILKENS	2080 OYSTER HARBORS OSTERVILLE, MA 02655
MAUREEN P WILKENS TR UA 7116 - CLUT	2248 WEST HILL ROAD STOWE, VT 056724000
MAUREEN P WILKENS TRUST UA 82516 - CLAT UAD 82516	2248 WEST HILL ROAD STOWE, VT 056724000

TY 2018 Taxes Schedule**Name:** THE WILKENS FAMILY FOUNDATION**EIN:** 47-5634424

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	13,745	0		0
FOREIGN TAX PAID	3,002	3,002		0

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

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, or 990-PF
▶ Go to www.irs.gov/Form990 for the latest information

OMB No 1545-0047
2018

Name of the organization
THE WILKENS FAMILY FOUNDATION

Employer identification number
47-5634424

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

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

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹ 3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization THE WILKENS FAMILY FOUNDATION	Employer identification number 47-5634424
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MAUREEN P WILKENS TRUST UA 82516 - CLAT UAD 82516	\$ 2,190,888	Person <input type="checkbox"/>
	2248 W HILL RD		Payroll <input type="checkbox"/>
	STOWE, VT 056724000		Noncash <input checked="" type="checkbox"/>
			(Complete Part II for noncash contributions)
2	MAUREEN P WILKENS TRUST UA 82516 - CLAT UAD 82516	\$ 21,267	Person <input checked="" type="checkbox"/>
	2248 W HILL RD		Payroll <input type="checkbox"/>
	STOWE, VT 056724000		Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
3	MAUREEN P WILKENS TRUST UA 7116 - CLUT	\$ 518,616	Person <input type="checkbox"/>
	2248 W HILL RD		Payroll <input type="checkbox"/>
	STOWE, VT 056724000		Noncash <input checked="" type="checkbox"/>
			(Complete Part II for noncash contributions)
4	MAUREEN P WILKENS TRUST UA 7116 - CLUT	\$ 22,463	Person <input checked="" type="checkbox"/>
	2248 W HILL RD		Payroll <input type="checkbox"/>
	STOWE, VT 056724000		Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)

Name of organization THE WILKENS FAMILY FOUNDATION	Employer identification number 47-5634424
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Part II Noncash Property

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	10,350 SHARES HOME DEPOT STOCK	\$ 2,190,888	2018-09-19
3	2,450 SHARES HOME DEPOT STOCK	\$ 518,616	2018-09-19
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization THE WILKENS FAMILY FOUNDATION	Employer identification number 47-5634424
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Part III *Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____
 Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____