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. 1545-0047
2023
Open to Public Inspection

For calendar year 2023, or tax year beginning 01-01-2023 , and ending 12-31-2023

Name of foundation
THE ROBERT W WILSON CHARITABLE TRUST

A Employer identification number
51-6536168

Number and street (or P.O. box number if mail is not delivered to street address) R SCHNEIDMAN TTE ANCHIN 3 TIMES
Room/suite

B Telephone number (see instructions)
(212) 840-3456

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10036

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

D 1. Foreign organizations, check here............ ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here .... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16*) ▶$ 199,455,244

J Accounting method: ☑ Cash ☐ Accrual
☐ 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 .... ▶ ☐

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

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	93	93		
	4	Dividends and interest from securities . . .	3,347,312	3,347,312		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	12,899,071			
	b	Gross sales price for all assets on line 6a 119,673,897				
	7	Capital gain net income (from Part IV, line 2) . . .		12,891,164		
	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)	1,665	1,665		
	12	**Total.** Add lines 1 through 11	16,248,141	16,240,234		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	767,706	218,312		549,394
	14	Other employee salaries and wages	153,298	61,319		91,979
	15	Pension plans, employee benefits	50,330	20,132		30,198
	16a	Legal fees (attach schedule)	32,831	0		32,831
	b	Accounting fees (attach schedule)	246,795	74,039		172,756
	c	Other professional fees (attach schedule)	610,212	585,020		25,192
	17	Interest				
	18	Taxes (attach schedule) (see instructions) . . .	131,417	36,417		0
	19	Depreciation (attach schedule) and depletion . . .				
	20	Occupancy				
	21	Travel, conferences, and meetings	5,780	0		5,780
	22	Printing and publications	170	0		170
	23	Other expenses (attach schedule)	50,999	31,923		19,076
	24	**Total operating and administrative expenses.** Add lines 13 through 23	2,049,538	1,027,162		927,376
	25	Contributions, gifts, grants paid	12,118,893			12,118,893
	26	**Total expenses and disbursements.** Add lines 24 and 25	14,168,431	1,027,162		13,046,269
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	2,079,710			
	b	**Net investment income** (if negative, enter -0-)		15,213,072		
	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			
2	Savings and temporary cash investments	5,133,961	21,963,276	21,963,276
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)	12,624,908	28,310,759	28,310,759
b	Investments—corporate stock (attach schedule)	131,432,979	93,914,733	93,914,733
c	Investments—corporate bonds (attach schedule)	0	22,834,988	22,834,988
11	Investments—land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	42,720,380	32,266,431	32,266,431
14	Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)	105	165,057	165,057
16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	191,912,333	199,455,244	199,455,244
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 FASB ASC 958, check here ▶ ☑ **and complete lines 24, 25, 29 and 30.**			
24	Net assets without donor restrictions	191,912,333	199,455,244	
25	Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ **and complete lines 26 through 30.**			
26	Capital stock, trust principal, or current funds			
27	Paid-in or capital surplus, or land, bldg., and equipment fund			
28	Retained earnings, accumulated income, endowment, or other funds			
29	**Total net assets or fund balances** (see instructions)	191,912,333	199,455,244	
30	**Total liabilities and net assets/fund balances** (see instructions)	191,912,333	199,455,244	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	191,912,333
2	Enter amount from Part I, line 27a	2	2,079,710
3	Other increases not included in line 2 (itemize) ▶	3	5,463,201
4	Add lines 1, 2, and 3	4	199,455,244
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 29	6	199,455,244

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	1,344 SHARES OF PINEHURST	P	2015-04-01	2023-09-30
b	19,249 SHARES OF JANUS HENDERSON	P	2022-01-07	2023-11-30
c	3,973 SHARES OF BLACK DIAMOND	P	2020-09-01	2023-12-31
d	2,624 SHARES OF SQN	P	2019-04-01	2023-10-16
e	CLASS ACTION LITIGATION		2022-01-01	2023-12-31
	PUBLICLY TRADED SECURITIES - FIDELITY		2022-01-01	2023-12-31
	CAPITAL GAIN DISTRIBUTIONS		2022-01-01	2023-12-31
	CAPITAL GAINS THROUGH WELLINGTON PARTNERSHIP	P	2022-01-01	2023-12-31
	SECTION 1256 GAINS THROUGH WELLINGTON PARTNERSHIP	P	2022-01-01	2023-12-31
	CAPITAL GAINS THROUGH FARALLON PARTNERSHIP	P	2022-01-01	2023-12-31
	7,685 SHARES OF PINEHURST - SEE STMT. 15	P	2015-04-01	2023-12-31
	1,174 SHARES OF PINEHURST - SEE STMT. 16	P	2015-01-01	2023-03-03
	3,973 SHARES OF BLACK DIAMOND - SEE STMT. 17	P	2020-09-01	2023-12-31

	(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	3,000,000		2,137,412	862,588
b	2,013,475		2,000,000	13,475
c	1,581,215		1,500,000	81,215
d	1,626,690		2,623,847	-997,157
e	127,405			127,405
	87,985,701		76,639,109	11,346,592
	526,810			526,810
	200,343			200,343
	12,739			12,739
	84,479			84,479
	18,399,815		18,399,815	0
	2,500,000		1,867,325	632,675
	1,615,225		1,615,225	0

	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				862,588
b				13,475
c				81,215
d				-997,157
e				127,405
				11,346,592
				526,810
				200,343
				12,739
				84,479
				0
				632,675
				0

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	12,891,164
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 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. Date of ruling or determination letter: ________ **(attach copy of letter if necessary–see instructions)**		1	211,462
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0
3	Add lines 1 and 2.		3	211,462
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	211,462
6	Credits/Payments:			
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a 80,981		
b	Exempt foreign organizations—tax withheld at source	6b 0		
c	Tax paid with application for extension of time to file (Form 8868) . . .	6c 400,000		
d	Backup withholding erroneously withheld	6d 0		
7	Total credits and payments. Add lines 6a through 6d		7	480,981
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	269,519
11	Enter the amount of line 10 to be: **Credited to 2024 estimated tax** ▶ 269,519	**Refunded** ▶	11	0

Part VI-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.	1b		No
	*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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
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*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
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? *If "Yes," attach the statement required by General Instruction T.*	5		No
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	Yes	
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 XIV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NY			
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*	8b	Yes	
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 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ N/A

14 The books are in care of ▶ RICHARD SCHNEIDMAN TRUSTEE Telephone no. ▶ (212) 840-3456

Located at ▶ C/O ANCHIN 3 TIMES SQUARE NEW YORK NY ZIP+4 ▶ 10036

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

			Yes	No
16	At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
	(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)?	1a(5)		No
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
c	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?	2a		No
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
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.)	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. ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a		No
b	If "Yes," did it have excess business holdings in 2023 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?	4b		No

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

			Yes	No
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))?	5a(1)		No
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)	Yes	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		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		No
c	Organizations relying on a current notice regarding disaster assistance check ▶ ☐			
d	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?	5d	Yes	
	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?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		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?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
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?	8		No

Part VII **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
RICHARD SCHNEIDMAN C/O ANCHIN 3 TIMES SQUARE NEW YORK, NY 10036	TRUSTEE 36.00	727,700	0	0
ROBERT FEIDELSON R SCHNEIDMAN-ANCHIN-3 TIMES SQUARE NEW YORK, NY 10036	TRUSTEE 1.50	20,000	0	0
ERIC WEITZ R SCHNEIDMAN-ANCHIN-3 TIMES SQUARE NEW YORK, NY 10036	TRUSTEE 1.50	20,000	0	0

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
ANGELA RICCARDI DECEASED 31124 C/O ANCHIN 3 TIMES SQUARE NEW YORK,NY 10036	CONTROLLER 36.00	153,298	38,324	0

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

Part VII **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
FIDUCIARY TRUST INTERNATIONAL 55 OLD BEDFORD ROAD LINCOLN,MA 01773	INVESTMENT ADVISOR	415,975
ANCHIN BLOCK & ANCHIN LLP 3 TIMES SQUARE NEW YORK,NY 10036	ACCTG, TAX, CONSULTG	246,795
SELECT EQUITY GROUP LP 380 LAFAYETTE ST SUITE 302 NEW YORK,NY 100036933	INVESTMENT ADVISOR	135,579

Total number of others receiving over $50,000 for professional services. . . . . ▶ 0

Part VIII- 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 N/A	0
2	
3	
4	

Part VIII- 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 IX 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	145,687,869
b	Average of monthly cash balances	1b	8,697,825
c	Fair market value of all other assets (see instructions)	1c	39,428,414
d	**Total** (add lines 1a, b, and c)	1d	193,814,108
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	193,814,108
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	2,907,212
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3.	5	190,906,896
6	**Minimum investment return.** Enter 5% (0.05) of line 5	6	9,545,345

Part X 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 IX, line 6	1	9,545,345
2a	Tax on investment income for 2022 from Part V, line 5 — 2a: 211,462		
b	Income tax for 2022. (This does not include the tax from Part V.) — 2b:		
c	Add lines 2a and 2b	2c	211,462
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	9,333,883
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	9,333,883
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 XII, line 1	7	9,333,883

Part XI 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	13,046,269
b	Program-related investments—total from Part VIII-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 XII, line 4.	4	13,046,269

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

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				9,333,883
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			0	
b Total for prior years: 20 ___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018. 7,861,413				
b From 2019. 8,997,237				
c From 2020. 9,164,869				
d From 2021. 6,070,364				
e From 2022. 4,727,062				
f **Total** of lines 3a through e	36,820,945			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ $ 13,046,269				
a Applied to 2022, but not more than line 2a			0	
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 2023 distributable amount				9,333,883
e Remaining amount distributed out of corpus	3,712,386			
5 Excess distributions carryover applied to 2023. *(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	40,533,331			
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 2022. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				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 2018 not applied on line 5 or line 7 (see instructions) . . .	7,861,413			
9 **Excess distributions carryover to 2024.** Subtract lines 7 and 8 from line 6a	32,671,918			
10 Analysis of line 9:				
a Excess from 2019 8,997,237				
b Excess from 2020 9,164,869				
c Excess from 2021. . . . 6,070,364				
d Excess from 2022 4,727,062				
e Excess from 2023 3,712,386				

Part XIII Private Operating Foundations (see instructions and Part VI-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 2023, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, 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 IX, 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 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 XIV Supplementary Information (continued)

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*				
54 BELOW INC 254 W 54TH STREET 10TH FLOOR NEW YORK,NY 10019		PC	GENERAL SUPPORT	10,000
AMERICAN BIRD CONSERVANCY PO BOX 249 4249 LOUDON AVENUE THE PLAINS,VA 20198		PC	GENERAL SUPPORT	280,000
AMERICAN CIVIL LIBERTIES UNION FOUNDATION 125 BROAD STREET 18TH FLOOR NEW YORK,NY 10004		PC	GENERAL SUPPORT	25,000
AMERICAN FRIENDS OF HEBREW UNIVERSITY 199 WATER STREET 11TH FLOOR NEW YORK,NY 10038		PC	GENERAL SUPPORT	40,000
AMERICAN FRIENDS OF MAGEN DAVID ADOM 20 W 36TH STREET SUITE 1100 NEW YORK,NY 10018		PC	GENERAL SUPPORT	100,000
AMERICAN JEWISH COMMITTEE PO BOX 7247 PHILADELPHIA,PA 19170		PC	GENERAL SUPPORT	10,000
AMERICAN RED CROSS 520 WEST 49TH STREET NEW YORK,NY 10019		PC	GENERAL SUPPORT	25,000
AMHERST COLLEGE PO BOX 5000 AMHERST,MA 010025000		PC	GENERAL SUPPORT	200
ANTI-DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK,NY 10158		PC	GENERAL SUPPORT	50,000
BLINK OF AN EYE 728 DEEPDENE RD BALTIMORE,MD 21210		PC	GENERAL SUPPORT	10,000
BONE & MARROW CANCER FOUNDATION 515 MADISON AVENUE NEW YORK,NY 10022		PC	GENERAL SUPPORT	10,000
BOSTON LATIN SCHOOL ASSOCIATION 27 SCHOOL ST BOSTON,MA 02108		PC	GENERAL SUPPORT	10,000
BOTTOMLESS CLOSET 1 WEST 34TH STREET FIFTH FLOOR NEW YORK,NY 10001		PC	GENERAL SUPPORT	25,000
BRIDGE FUND OF NY 271 MADISON AVENUE SUITE 907 NEW YORK,NY 10016		PC	GENERAL SUPPORT	5,000
BRIDGEPORT RESCUE MISSION PO BOX 9057 BRIDGEPORT,CT 06601		PC	GENERAL SUPPORT	2,500
BROOKLYN BOTANIC GARDEN 1000 WASHINGTON AVENUE BROOKLYN,NY 11225		PC	GENERAL SUPPORT	500,000
BYRD HOFFMAN WATERMILL FOUNDATION 39 WATERMILL TOWN ROAD WATER MILL,NY 11976		PC	GENERAL SUPPORT	5,000
CENTRAL PARK CONSERVANCY 717 FIFTH AVENUE NEW YORK,NY 10022		PC	GENERAL SUPPORT	281,770
CENTRAL SYNAGOGUE 123 E 55TH STREET NEW YORK,NY 10022		PC	GENERAL SUPPORT	112,500
CHESAPEAKE CONSERVANCY ATTN MEMBERSHIP DEPARTMENT - 6 HERNDON AVENUE ANNAPOLIS,MD 21403		PC	GENERAL SUPPORT	25,000
CHILDREN'S ACADEMY 317 EAST 50TH STREET NEW YORK,NY 10027		PC	GENERAL SUPPORT	10,000
CHILDREN'S AID SOCIETY 117 WEST 124TH STREET 5TH FLOOR NEW YORK,NY 10027		PC	GENERAL SUPPORT	15,000
CHRISTOPHER & DANA REEVE FOUNDATION 636 MORRIS TURNPIKE SUITE 3A SHORT HILLS,NJ 07078		PC	GENERAL SUPPORT	5,000
CITY HARVEST 6 EAST 32ND STREET 5TH FLOOR NEW YORK,NY 10016		PC	GENERAL SUPPORT	5,000
CIVIC & CULTURAL RESTORATION PO BOX 68 5 MAIN STREET HOOSICK FALLS,NY 12090		PC	GENERAL SUPPORT	40,000
COLUMBIA UNIVERSITY 622 WEST 113TH STREET MC 4524 NEW YORK,NY 10025		PC	GENERAL SUPPORT	10,000
COMMUNITY CAPITAL NEW YORK 44 EXECUTIVE BLVD SUITE 203 ELMSFORD,NY 10953		PC	GENERAL SUPPORT	5,000
CONSERVATION STRATEGY FUND 1800 MASSACHUSETTS AVE NW SUITE 402 WASHINGTON,DC 20036		PC	GENERAL SUPPORT	2,500
DRUG POLICY ALLIANCE 131 WEST 33RD STREET 15TH FLOOR NEW YORK,NY 10001		PC	GENERAL SUPPORT	600,000
DUKE LEMUR CENTER ALUMNI AND DEVELOPMENT RECORDS - BOX 90581 DURHAM,NC 27708		PC	GENERAL SUPPORT	10,000
ENVIRONMENTAL DEFENSE FUND 257 PARK AVENUE SOUTH NEW YORK,NY 10010		PC	GENERAL SUPPORT	1,000,000
FOOD & ENVIRONMENT REPORTING NETWORK 580 5TH AVENUE SUITE 820 NEW YORK,NY 10036		PC	GENERAL SUPPORT	5,000
FRIENDS OF KAREN 118 TITICUS ROAD NORTH SALEM,NY 10560		PC	GENERAL SUPPORT	5,000
FRIENDS OF LACHAT C/O 31 FANTON HILL ROAD WESTON,CT 06883		PC	GENERAL SUPPORT	12,500
FSHD SOCIETY PO BOX 411617 BOSTON,MA 02241		PC	GENERAL SUPPORT	2,500
HASTINGS CENTER 21 MALCOLM GORDON ROAD GARRISON,NY 10524		PC	GENERAL SUPPORT	42,500
HEART P 0 BOX 738 MAMARONECK,NY 10543		PC	GENERAL SUPPORT	2,500
HISTORIC HOUSE TRUST 830 FIFTH AVENUE THE ARSENAL ROOM 203 NEW YORK,NY 10065		PC	GENERAL SUPPORT	5,000
HOUR CHILDREN 36-11 12TH STREET LONG ISLAND CITY,NY 11106		PC	GENERAL SUPPORT	10,000
HUMANS RIGHTS FIRST 75 BROAD ST 31ST FLOOR NEW YORK,NY 10004		PC	GENERAL SUPPORT	10,000
INNER CITY SCHOLARSHIP 1011 FIRST AVENUE SUITE 1800 NEW YORK,NY 10022		PC	GENERAL SUPPORT	25,000
INSTITUTE FOR JUSTICE 901 N GLEBE ROAD SUITE 900 ARLINGTON,VA 22203		PC	GENERAL SUPPORT	50,000
ISRAEL TENNIS & EDUCATION CENTER FOUNDATION 165 EAST 56 STREET 2ND FL NEW YORK,NY 10022		PC	GENERAL SUPPORT	5,000
JEWISH NATIONAL FUND 42 EAST 69TH STREET NEW YORK,NY 10021		PC	GENERAL SUPPORT	50,000
JUILLARD SCHOOL 60 LINCOLN CENTER PLAZA NEW YORK,NY 10023		PC	GENERAL SUPPORT	25,000
LANDMARKS WEST 45 WEST 67TH STREET NEW YORK,NY 10023		PC	GENERAL SUPPORT	1,000
MANHATTAN CLASS CO 511 WEST 52ND STREET NEW YORK,NY 10019		PC	GENERAL SUPPORT	10,000
MOUNT SINAI HOSPITAL ONE GUSTAVE L LEVY PLACE BOX 1049 NEW YORK,NY 10029		PC	GENERAL SUPPORT	10,000
MUNICIPAL ART SOCIETY 488 MADISON AVENUE SUITE 1900 NEW YORK,NY 10022		PC	GENERAL SUPPORT	25,000
MUSEUM OF JEWISH HERITAGE 36 BATTERY PLACE NEW YORK,NY 10280		PC	GENERAL SUPPORT	10,000
MUSICIANS ON CALL 618 GRASSMERE PARK SUITE 1 NASHVILLE,TN 37211		PC	GENERAL SUPPORT	10,000
NATURE & CULTURE INTL 1400 MAIDEN LANE DEL MAR,CA 92014		PC	GENERAL SUPPORT	25,000
NATURE CONSERVANCY 322 8TH AVENUE 14TH FLOOR NEW YORK,NY 10001		PC	GENERAL SUPPORT	2,746,000
NEW YORK LANDMARKS CONSERVANCY ONE WHITEHALL STREET NEW YORK,NY 10004		PC	GENERAL SUPPORT	25,000
NEW YORK PHILHARMONIC 10 LINCOLN CENTER PLAZA NEW YORK,NY 10023		PC	GENERAL SUPPORT	25,000
NEW YORK PUBLIC LIBRARY 270 MADISON AVE 12TH FLOOR NEW YORK,NY 10016		PC	GENERAL SUPPORT	2,000,000
NEW YORK UNIVERSITY STERN CENTER 44 WEST 4TH STREET NEW YORK,NY 10012		PC	GENERAL SUPPORT	50,000
NY COMMUNITY FRIDGE CORP 185 EAST 85TH STREET APT 21A NEW YORK,NY 10028		PC	GENERAL SUPPORT	5,000
NYC OUTWARD BOUND SCHOOLS 29-46 NORTHERN BLVD LONG ISLAND CITY,NY 11101		PC	GENERAL SUPPORT	10,000
PLANNED PARENTHOOD ATTN ONLINE SERVICES PO BOX 97166 WASHINGTON,DC 20090		PC	GENERAL SUPPORT	5,000
POLICE ATHLETIC LEAGUE 34 1/2 EAST 12TH STREET NEW YORK,NY 10003		PC	GENERAL SUPPORT	5,000
SCENIC HUDSON 85 CIVIC CENTER PLAZA SUITE 300 POUGHKEEPSIE,NY 12601		PC	GENERAL SUPPORT	10,000
SHELBURNE FARMS 1611 HARBOR RD SHELBURNE,VT 05482		PC	GENERAL SUPPORT	10,000
STEM TEACHERS NYC 245 WEST 107TH STREET SUITE 10B NEW YORK,NY 10025		PC	GENERAL SUPPORT	10,000
SUNRISE DAY CAMP 11 NEIL COURT OCEANSIDE,NY 11572		PC	GENERAL SUPPORT	5,000
TENEMENT MUSEUM 103 ORCHARD STREET NEW YORK,NY 10002		PC	GENERAL SUPPORT	10,000
THE METROPOLITAN OPERA 30 LINCOLN CENTER NEW YORK,NY 10023		PC	GENERAL SUPPORT	250,000
UJA FEDERATION NY PO BOX 4227 NEW YORK,NY 10261		PC	GENERAL SUPPORT	100,000
VERA INSTITUTE OF JUSTICE 34 35TH STREET 4-2A BROOKLYN,NY 11232		PC	GENERAL SUPPORT	75,000
WCPE CLASSICAL RADIO PO BOX 828 WAKE FOREST,NC 27588		PC	GENERAL SUPPORT	5,000
WESTCHESTER LAND TRUST 403 HARRIS ROAD BEDFORD HILLS,NY 10507		PC	GENERAL SUPPORT	5,000
WHITNEY MUSEUM 99 GANSEVOORT STREET NEW YORK,NY 10014		PC	GENERAL SUPPORT	100,000
WILDLIFE CONSERVATION SOCIETY 2300 SOUTHERN BLVD BRONX,NY 10460		PC	GENERAL SUPPORT	625,000
WORLD MONUMENTS FUND 600 FIFTH AVENUE 25TH FL NEW YORK,NY 10020		PC	GENERAL SUPPORT	1,755,194
JBS EDUCATION LTD CO UNIVERSITY OF CAMBRIDGE TRUMPINGTON STREET CAMBRIDGE CB AG UK		NC	DESIGN, DEVELOP AND START THE WILSON TRUST NATURAL ALLIES ENVIRONMENTAL LEADERSHIP PROGRAM TO DESIGN, DEVELOP, AND START THE WISON TRUST NATURAL ALLIES ENVIRONMENTAL LEADERSHIP PROGRAM TO EQUIP LEADERS IN ENVIRONMENTAL ORGANIZATIONS AND ENVIRONMENTAL NON-GOVERNMENT ENTITIES WITH THE RIGHT MINDSET, TOLLS AND FRAMEWORKS TO DRIVE CHANGES AND INNOVATIONS FOR MORE "MARKET-BASED" SOLUTIONS.	357,229
STAND WITH US 2215 1801 W OLYMPIC BLVD PASADENA,CA 91199		PC	GENERAL SUPPORT	5,000
JEWISH FEDERATION OF PALM BEACH COUNTY 1 HARVARD CIR 100 WEST PALM BEACH,FL 33409		PC	GENERAL SUPPORT	100,000
JEWISH INTERACTIVE 1856 N NOB HILL ROAD PLANTATION,FL 33322		PC	GENERAL SUPPORT	5,000
REFED 4602 21ST STREET PO BOX 1531 LONG ISLAND CITY,NY 11101		PC	GENERAL SUPPORT	250,000
Total . . . . ▶ **3a**				12,118,893
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
1 Program service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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			14	93	
4 Dividends and interest from securities			14	3,347,312	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	12,899,071	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a ORDINARY INCOME THROUGH WELLINGTON PARTNERSHIP			18	2,458	
b REALIZED LOSS ON FOREIGN CURRENCY			18	-793	
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		16,248,141	0

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 16,248,141

(See worksheet in line 13 instructions to verify calculations.)

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

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

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

Sign Here

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.

Signature of officer or trustee	Date	Title
	2024-11-14	

May the IRS discuss this return with the preparer shown below? See instructions. ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
BARRY LIEBERMAN		2024-11-14		P01264445

Firm's name ▶ ANCHIN BLOCK & ANCHIN LLP — Firm's EIN ▶13-0436940

Firm's address ▶ 3 TIMES SQUARE NEW YORK, NY 10036 — Phone no. (212) 840-3456

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING, TAX RETURN PREP, GRANT STRUCTURING/COMPLIANCE & CONSULTING	246,795	74,039		172,756

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

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
JBS EXECUTIVE EDUCATION LIMITED	C/O UNIVERSITY OF CAMBRIDGE TRUMPINGTON STREET CAMBRIDGE CB2 1AG UK	2023-05-01	357,229	DESIGN, DEVELOP AND START THE WILSON TRUST NATURAL ALLIES ENVIRONMENTAL LEADERSHIP PROGRAM TO EQUIP LEADERS IN ENVIRONMENTAL ORGANIZATIONS AND ENVIRONMENTAL NON-GOVERNMENT ENTITIES WITH THE RIGHT MINDSET, TOOLS AND FRAMEWORKS TO DRIVE CHANGES AND INNOVATIONS FOR MORE "MARKET-BASED" SOLUTIONS.	357,229	NO KNOWLEDGE OF ANY DIVERSIONS OF THE FUNDS FROM THE CHARITABLE PURPOSE.	5/25/23, 6/12/23		THE GRANTEE MAINTAINED RECORDS OF EXPENDITURES RELATING TO THE USE OF THE GRANT FUNDS AND PROVIDED GRANTOR WITH COPIES OF INVOICES AND PROGRESS REPORTS OF THE PROGRAMS SUPPORTED BY THE GRANT FUNDS, WHICH DOCUMENTS AND REPORTS WERE REVIEWED BY THE GRANTOR.

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Identifier	Return Reference	Explanation
INSTALLMENT SALE INCOME - SUBSTITUTE FORM 6252 - PINEHURST - 2023 SALE	FORM 990-PF, PART IV	1 DESCRIPTION OF PROPERTY - 7,685 SHARES OF PINEHURST INSTITUTIONAL FUND 2A DATE ACQUIRED (MM/DD/YYYY) - 04/01/2015 B DATE SOLD (MM/DD/YYYY) - 12/31/20233 WAS THE PROPERTY SOLD TO A RELATED PARTY? SEE INSTRUCTIONS. IF "YES," COMPLETE PART III FOR THE YEAR OF SALE AND 2 YEARS AFTER THE YEAR OF THE SALE UNLESS YOU RECEIVED THE FINAL PAYMENT DURING THE TAX YEAR . . . . NO4 RESERVED FOR FUTURE USE . . . . PART I GROSS PROFIT AND CONTRACT PRICE. COMPLETE THIS PART FOR ALL YEARS OF THE INSTALLMENT AGREEMENT.5 SELLING PRICE INCLUDING MORTGAGES AND OTHER DEBTS. DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED ....18,399,8156 MORTGAGES, DEBTS, AND OTHER LIABILITIES THE BUYER ASSUMED OR TOOK THE PROPERTY SUBJECT TO (SEE INSTRUCTIONS) . . . 07 SUBTRACT LINE 6 FROM LINE 5 . . . . 18,399,8158 COST OR OTHER BASIS OF PROPERTY SOLD . . . . 12,386,073 9 DEPRECIATION ALLOWED OR ALLOWABLE . . . . 010 ADJUSTED BASIS. SUBTRACT LINE 9 FROM LINE 8 . . . 12,386,07311 COMMISSIONS AND OTHER EXPENSES OF SALE . . . . 0 12 INCOME RECAPTURE FROM FORM 4797, PART III (SEE INSTRUCTIONS) ...013 ADD LINES 10, 11, AND 12 . . . . 12,386,07314 SUBTRACT LINE 13 FROM LINE 5. IF ZERO OR LESS, DON'T COMPLETE THE REST OF THIS FORM. SEE INSTRUCTIONS . . 6,013,74215 IF THE PROPERTY DESCRIBED ON LINE 1 ABOVE WAS YOUR MAIN HOME, ENTER THE AMOUNT OF YOUR EXCLUDED GAIN. SEE INSTRUCTIONS. OTHERWISE, ENTER -0- . . . . 0 16 GROSS PROFIT. SUBTRACT LINE 15 FROM LINE 14 . . . . 6,013,74217 SUBTRACT LINE 13 FROM LINE 6. IF ZERO OR LESS, ENTER -0- . . . . . 018 CONTRACT PRICE. ADD LINE 7 AND LINE 17 . . . . 18,399,815 PART II INSTALLMENT SALE INCOME. COMPLETE THIS PART FOR ALL YEARS OF THE INSTALLMENT AGREEMENT.19 GROSS PROFIT PERCENTAGE (EXPRESSED AS A DECIMAL AMOUNT). DIVIDE LINE 16 BY LINE 18. (FOR YEARS AFTER THE YEAR OF SALE, SEE INSTRUCTIONS.) . . . . 0.3268420 IF THIS IS THE YEAR OF SALE, ENTER THE AMOUNT FROM LINE 17. OTHERWISE, ENTER -0- . . . 0 21 PAYMENTS RECEIVED DURING YEAR (SEE INSTRUCTIONS). DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED . 022 ADD LINES 20 AND 21 . . . . 023 PAYMENTS RECEIVED IN PRIOR YEARS (SEE INSTRUCTIONS). DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED . . . . 0 24 INSTALLMENT SALE INCOME. MULTIPLY LINE 22 BY LINE 19 . . . .025 ENTER THE PART OF LINE 24 THAT IS ORDINARY INCOME UNDER THE RECAPTURE RULES. SEE INSTRUCTIONS . . . 026 SUBTRACT LINE 25 FROM LINE 24. ENTER HERE AND ON SCHEDULE D OR FORM 4797. SEE INSTRUCTIONS 0
INSTALLMENT SALE INCOME - SUBSTITUTE FORM 6252 - PINEHURST - 2022 SALE	FORM 990-PF, PART IV	1 DESCRIPTION OF PROPERTY - 1,174 SHARES OF PINEHURST INSTITUTIONAL FUND 2A DATE ACQUIRED (MM/DD/YYYY) - 01/01/2015 B DATE SOLD (MM/DD/YYYY) - 12/31/2022 3 WAS THE PROPERTY SOLD TO A RELATED PARTY? SEE INSTRUCTIONS. IF "YES," COMPLETE PART III FOR THE YEAR OF SALE AND 2 YEARS AFTER THE YEAR OF THE SALE UNLESS YOU RECEIVED THE FINAL PAYMENT DURING THE TAX YEAR . . . . NO4 RESERVED FOR FUTURE USE . . . . PART I GROSS PROFIT AND CONTRACT PRICE. COMPLETE THIS PART FOR ALL YEARS OF THE INSTALLMENT AGREEMENT.5 SELLING PRICE INCLUDING MORTGAGES AND OTHER DEBTS. DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED 2,500,0006 MORTGAGES, DEBTS, AND OTHER LIABILITIES THE BUYER ASSUMED OR TOOK THE PROPERTY SUBJECT TO (SEE INSTRUCTIONS) . . . 07 SUBTRACT LINE 6 FROM LINE 5 . . . . 08 COST OR OTHER BASIS OF PROPERTY SOLD . . . . 1,867,325 9 DEPRECIATION ALLOWED OR ALLOWABLE . . . . 010 ADJUSTED BASIS. SUBTRACT LINE 9 FROM LINE 8 . . . 1,867,32511 COMMISSIONS AND OTHER EXPENSES OF SALE . . . . 0 12 INCOME RECAPTURE FROM FORM 4797, PART III (SEE INSTRUCTIONS) ...013 ADD LINES 10, 11, AND 12 . . . . 1,867,32514 SUBTRACT LINE 13 FROM LINE 5. IF ZERO OR LESS, DON'T COMPLETE THE REST OF THIS FORM. SEE INSTRUCTIONS . . 632,67515 IF THE PROPERTY DESCRIBED ON LINE 1 ABOVE WAS YOUR MAIN HOME, ENTER THE AMOUNT OF YOUR EXCLUDED GAIN. SEE INSTRUCTIONS. OTHERWISE, ENTER -0- . . . . 0 16 GROSS PROFIT. SUBTRACT LINE 15 FROM LINE 14 . . . . 632,37517 SUBTRACT LINE 13 FROM LINE 6. IF ZERO OR LESS, ENTER -0- . . . . . 018 CONTRACT PRICE. ADD LINE 7 AND LINE 17 . . . . 2,500,000PART II INSTALLMENT SALE INCOME. COMPLETE THIS PART FOR ALL YEARS OF THE INSTALLMENT AGREEMENT.19 GROSS PROFIT PERCENTAGE (EXPRESSED AS A DECIMAL AMOUNT). DIVIDE LINE 16 BY LINE 18. (FOR YEARS AFTER THE YEAR OF SALE, SEE INSTRUCTIONS.) . . . . 0.2529520 IF THIS IS THE YEAR OF SALE, ENTER THE AMOUNT FROM LINE 17. OTHERWISE, ENTER -0- . . . 0 21 PAYMENTS RECEIVED DURING YEAR (SEE INSTRUCTIONS). DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED . 2,500,00022 ADD LINES 20 AND 21 . . . . 2,500,00023 PAYMENTS RECEIVED IN PRIOR YEARS (SEE INSTRUCTIONS). DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED . . . . 0 24 INSTALLMENT SALE INCOME. MULTIPLY LINE 22 BY LINE 19 . . . .632,37525 ENTER THE PART OF LINE 24 THAT IS ORDINARY INCOME UNDER THE RECAPTURE RULES. SEE INSTRUCTIONS . . . 026 SUBTRACT LINE 25 FROM LINE 24. ENTER HERE AND ON SCHEDULE D OR FORM 4797. SEE INSTRUCTIONS... 632,375
INSTALLMENT SALE INCOME - SUBSTITUTE FORM 6252 - BLACK DIAMOND	FORM 990-PF, PART IV	1 DESCRIPTION OF PROPERTY - 3,973 SHARES OF BLACK DIAMOND ARBITRAGE, LTD. 2A DATE ACQUIRED (MM/DD/YYYY) - 09/01/2020 B DATE SOLD (MM/DD/YYYY) - 12/31/20233 WAS THE PROPERTY SOLD TO A RELATED PARTY? SEE INSTRUCTIONS. IF "YES," COMPLETE PART III FOR THE YEAR OF SALE AND 2 YEARS AFTER THE YEAR OF THE SALE UNLESS YOU RECEIVED THE FINAL PAYMENT DURING THE TAX YEAR . . . . NO4 RESERVED FOR FUTURE USE . . . . PART I GROSS PROFIT AND CONTRACT PRICE. COMPLETE THIS PART FOR ALL YEARS OF THE INSTALLMENT AGREEMENT.5 SELLING PRICE INCLUDING MORTGAGES AND OTHER DEBTS. DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED... 1,615,225 6 MORTGAGES, DEBTS, AND OTHER LIABILITIES THE BUYER ASSUMED OR TOOK THE PROPERTY SUBJECT TO (SEE INSTRUCTIONS) . . . 07 SUBTRACT LINE 6 FROM LINE 5 . . . . 1,615,225 8 COST OR OTHER BASIS OF PROPERTY SOLD . . . . 1,500,000 9 DEPRECIATION ALLOWED OR ALLOWABLE . . . . 010 ADJUSTED BASIS. SUBTRACT LINE 9 FROM LINE 8 . . . 1,500,00011 COMMISSIONS AND OTHER EXPENSES OF SALE . . . . 0 12 INCOME RECAPTURE FROM FORM 4797, PART III (SEE INSTRUCTIONS) ...013 ADD LINES 10, 11, AND 12 . . . . 1,500,00014 SUBTRACT LINE 13 FROM LINE 5. IF ZERO OR LESS, DON'T COMPLETE THE REST OF THIS FORM. SEE INSTRUCTIONS . . 115,22515 IF THE PROPERTY DESCRIBED ON LINE 1 ABOVE WAS YOUR MAIN HOME, ENTER THE AMOUNT OF YOUR EXCLUDED GAIN. SEE INSTRUCTIONS. OTHERWISE, ENTER -0- . . . . 0 16 GROSS PROFIT. SUBTRACT LINE 15 FROM LINE 14 . . . . 115,225 17 SUBTRACT LINE 13 FROM LINE 6. IF ZERO OR LESS, ENTER -0- . . . . . 018 CONTRACT PRICE. ADD LINE 7 AND LINE 17 . . . . 1,615,225 PART II INSTALLMENT SALE INCOME. COMPLETE THIS PART FOR ALL YEARS OF THE INSTALLMENT AGREEMENT.19 GROSS PROFIT PERCENTAGE (EXPRESSED AS A DECIMAL AMOUNT). DIVIDE LINE 16 BY LINE 18. (FOR YEARS AFTER THE YEAR OF SALE, SEE INSTRUCTIONS.) . . . . 0.0713420 IF THIS IS THE YEAR OF SALE, ENTER THE AMOUNT FROM LINE 17. OTHERWISE, ENTER -0- . . . 0 21 PAYMENTS RECEIVED DURING YEAR (SEE INSTRUCTIONS). DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED . 022 ADD LINES 20 AND 21 . . . . 023 PAYMENTS RECEIVED IN PRIOR YEARS (SEE INSTRUCTIONS). DON'T INCLUDE INTEREST, WHETHER STATED OR UNSTATED . . . . 0 24 INSTALLMENT SALE INCOME. MULTIPLY LINE 22 BY LINE 19 . . . .025 ENTER THE PART OF LINE 24 THAT IS ORDINARY INCOME UNDER THE RECAPTURE RULES. SEE INSTRUCTIONS . . . 026 SUBTRACT LINE 25 FROM LINE 24. ENTER HERE AND ON SCHEDULE D OR FORM 4797. SEE INSTRUCTIONS 0
ELECTION TO AMORTIZE BOND PREMIUM	FORM 990-PF, PART I, LINE 4	TAXPAYER HEREBY ELECTS TO AMORTIZE BOND PREMIUM PURSUANT TO IRC SECTION 171(C) AND TREASURY REGULATION 1.171-4(A).

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Name of Bond	End of Year Book Value	End of Year Fair Market Value
495,000 PAR ABBVIE INC NOTE CALL MAKE WHOLE 3.20000% 05/14/2026	479,744	479,744
100,000 PAR AMAZON COM INC NOTE CALL MAKE WHOLE 4.55000% 12/01/2027	101,530	101,530
85,000 PAR AMERICAN ELEC PWR CO INC SER H NOTE 3.2% 11/13/2027	80,895	80,895
250,000 PAR AMERICAN ELEC PWR CO INC SER N NOTE 1.00000% 11/01/2025	236,666	236,666
340,000 PAR AMERICAN EXPRESS CO NOTE 4.90000% 02/13/2026	340,819	340,819
115,000 PAR AMERICAN EXPRESS CO NOTE 5.85000% 11/05/2027	119,915	119,915
290,000 PAR AMERICAN EXPRESS CO NOTE 6.33800% 10/30/2026	295,670	295,670
435,000 PAR AMERICAN HONDA FIN CORP SER A MTN 5.25000% 07/07/2026	443,274	443,274
320,000 PAR AMERICAN TOWER CORP NOTE CALL MAKE WHOLE 1.60000% 04/15/2026	295,792	295,792
130,000 PAR AMGEN 3.2% NOTE 11/2/27	124,186	124,186
300,000 PAR AON PLC NOTE CALL MAKE WHOLE 3.87500% 12/15/2025	293,865	293,865
85,000 PAR APPLE INC NOTE CALL MAKE WHOLE 3.00000% 11/13/2027	81,568	81,568
150,000 PAR BANK AMERICA CORP SER L MTN 3.24800% 10/21/2027 CALL MAKE WHOLE	109,417	109,417
315,000 PAR BANK AMERICA CORP 1.53% 12/6/25	302,825	302,825
75,000 PAR BANK MONTREAL MEDIUM SER H MTN 4.7% 09/14/2027	75,256	75,256
340,000 PAR BANK NOVA SCOTIA B C SER I MTN 4.75% 02/02/2026 CALL MAKE WHOLE	338,963	338,963
350,000 PAR BHP BILLITON FIN USA LTD NOTE 4.87500% 02/27/2026	351,726	351,726
205,000 PAR BOSTON PPTYS LTD PARTNERSHIP NOTE 3.65000% 02/01/2026	197,308	197,308
50,000 PAR BOSTON PPTYS LTD PARTNERSHIP NOTE 6.75000% 12/01/2027	52,353	52,353
115,000 PAR BP CAP MKTS P L C NOTE CALL MAKE WHOLE 3.279% 09/19/2027	110,648	110,648
340,000 PAR BRISTOL-MYERS SQUIBB CO NOTE 0.75000% 11/13/2025 CALL MAKE WHOLE	317,278	317,278
115,000 PAR BRISTOL-MYERS SQUIBB CO SER C NOTE 3.45000% 11/15/2027	111,433	111,433
70,000 PAR CAPITAL ONE FINL CORP NOTE 1.87800% 11/02/2027	62,963	62,963
475,000 PAR CHUBB INA HLDGS INC NOTE CALL MAKE WHOLE 3.35000% 05/03/2026	462,104	462,104
340,000 PAR CITIGROUP INC NOTE 3.70000% 01/12/2026	331,789	331,789
255,000 PAR CITIZENS BK NA PROVIDENCE RI NOTE 6.06400% 10/24/2025	248,770	248,770
70,000 PAR CNH INDL N V MTN CALL MAKE WHOLE 3.85000% 11/15/2027	67,432	67,432
340,000 PAR COMCAST CORP NEW NOTE CALL MAKE WHOLE 5.25000% 11/07/2025	343,597	343,597
100,000 PAR COMCAST CORP NEW NOTE CALL MAKE WHOLE 5.35000% 11/15/2027	103,364	103,364
400,000 PAR CVS HEALTH CORP NOTE CALL MAKE WHOLE 5.00000% 02/20/2026	401,888	401,888

Name of Bond	End of Year Book Value	End of Year Fair Market Value
275,000 PAR DUKE ENERGY CORP NEW NOTE CALL MAKE WHOLE 5.00000% 12/08/2025	275,506	275,506
115,000 PAR DUKE ENERGY CORP NEW NOTE CALL MAKE WHOLE 5.00000% 12/08/2027	116,250	116,250
100,000 PAR ECOLAB INC SER B NOTE 3.25000% 12/01/2027 CALL MAKE WHOLE	95,943	95,943
340,000 PAR ELEVANCE HEALTH INC NOTE CALL MAKE WHOLE 1.50000% 03/15/2026	317,118	317,118
135,000 PAR ELEVANCE HEALTH INC NOTE CALL MAKE WHOLE 3.65000% 12/01/2027	130,947	130,947
340,000 PAR EVERSOURCE ENERGY SER AA NOTE 4.75000% 05/15/2026	338,191	338,191
420,000 PAR EXELON CORP NOTE CALL MAKE WHOLE 3.40000% 04/15/2026	406,589	406,589
115,000 PAR GENERAL DYNAMICS CORP NOTE 2.62500% 11/15/2027 CALL MAKE WHOLE	107,619	107,619
225,000 PAR GENERAL MILLS INC NOTE 5.24100% 11/18/2025	224,550	224,550
85,000 PAR GENERAL MTRS CO NOTE CALL MAKE WHOLE 6.80000% 10/01/2027	90,105	90,105
245,000 PAR GENERAL MTRS FINL CO INC NOTE 6.05000% 10/10/2025	247,788	247,788
130,000 PAR GILEAD SCIENCES INC NOTE CALL MAKE WHOLE 1.2% 10/01/2027	115,686	115,686
340,000 PAR GOLDMAN SACHS GROUP IN NOTE 0.855% 2/12/26	322,388	322,388
290,000 PAR GOLDMAN SACHS GROUP INC NOTE 5.79800% 08/10/2026 CALL MAKE WHOLE	292,801	292,801
60,000 PAR HOME DEPOT INC NOTE CALL MAKE WHOLE 2.80000% 09/14/2027	57,031	57,031
420,000 PAR HOME DEPOT INC NOTE CALL MAKE WHOLE 3.00000% 04/01/2026	406,984	406,984
200,000 PAR HSBC HLDGS PLC NOTE CALL MAKE WHOLE 2.25100% 11/22/2027	183,574	183,574
95,000 PAR INTEL CORP NOTE CALL MAKE WHOLE 3.75000% 08/05/2027	93,103	93,103
340,000 PAR INTEL CORP NOTE CALL MAKE WHOLE 4.87500% 02/10/2026	342,523	342,523
215,000 PAR INTERCONTINENTAL EXCHANGE INC NOTE 3.75000% 12/01/2025	211,402	211,402
120,000 PAR INTERCONTINENTAL EXCHANGE INC NOTE 4.00000% 09/15/2027	117,986	117,986
80,000 PAR JOHN DEERE CAPITAL CORPORATION SER H 4.15000% 09/15/2027 MTN	79,482	79,482
320,000 PAR JOHN DEERE CAPITAL CORPORATION SER I 4.75000% 06/08/2026 MTN	322,147	322,147
340,000 PAR JPMORGAN CHASE &CO NOTE CALL MAKE WHOLE 5.54600% 12/15/2025	340,218	340,218
150,000 PAR JPMORGAN CHASE &CO NOTE CALL MAKE WHOLE 6.07000% 10/22/2027	154,307	154,307
100,000 PAR LOCKHEED MARTIN CORP NOTE CALL MAKE WHOLE 5.10000% 11/15/2027	103,214	103,214
400,000 PAR LOWES COS INC NOTE CALL MAKE WHOLE 2.50000% 04/15/2026	380,896	380,896
75,000 PAR MARTIN MARIETTA MATLS INC NOTE 3.50000% 12/15/2027	71,800	71,800
200,000 PAR MITSUBISHI UFJ FINANCIAL GROUP NOTE 1.64000% 10/13/2027	182,167	182,167
430,000 PAR MORGAN STANLEY SER F MTN 3.87500% 01/27/2026 CALL MAKE WHOLE	421,146	421,146

Name of Bond	End of Year Book Value	End of Year Fair Market Value
65,000 PAR MPLX LP SER C NOTE 4.25000% 12/01/2027 CALL MAKE WHOLE	63,588	63,588
340,000 PAR NATIONAL RURAL UTILS COOP FIN MTN 4.45000% 03/13/2026	339,487	339,487
110,000 PAR ORACLE CORP NOTE CALL MAKE WHOLE 3.25000% 11/15/2027	104,431	104,431
250,000 PAR ORACLE CORP NOTE CALL MAKE WHOLE 5.80000% 11/10/2025	253,898	253,898
90,000 PAR OREILLY AUTOMOTIVE INC NOTE 3.60000% 09/01/2027 CALL MAKE WHOLE	86,738	86,738
115,000 PAR PEPSICO INC NOTE CALL MAKE WHOLE 3.00000% 10/15/2027	110,440	110,440
440,000 PAR PFIZER INVT ENTERPRISES NOTE 4.45000% 05/19/2026	438,754	438,754
85,000 PAR PHILLIPS 66 CO NOTE CALL MAKE WHOLE 4.95000% 12/01/2027	85,714	85,714
340,000 PAR PNC FINL SVCS GROUP INC NOTE 5.67100% 10/28/2025	339,826	339,826
100,000 PAR PNC FINL SVCS GROUP INC NOTE 6.61500% 10/20/2027	103,732	103,732
115,000 PAR PUBLIC SVC ENTERPRISE GROUP 5.85000% 11/15/2027 NOTE	119,705	119,705
120,000 PAR REALTY INCOME CORP NOTE CALL MAKE WHOLE 3.95000% 08/15/2027	116,648	116,648
340,000 PAR REALTY INCOME CORP NOTE CALL MAKE WHOLE 4.62500% 11/01/2025	337,797	337,797
100,000 PAR ROYAL BK CDA SER I MTN 6.00000% 11/01/2027 CALL MAKE WHOLE	104,640	104,640
400,000 PAR RTX CORPORATION NOTE CALL MAKE WHOLE 5.75000% 11/08/2026	411,040	411,040
320,000 PAR SEMPRA NOTE CALL MAKE WHOLE 5.40000% 08/01/2026	324,189	324,189
440,000 PAR SHELL INTERNATIONAL FIN BV NOTE 2.87500% 05/10/2026	424,094	424,094
350,000 PAR SIMON PPTY GROUP LP NOTE CALL MAKE WHOLE 3.30000% 01/15/2026	339,070	339,070
100,000 PAR SIMON PPTY GROUP LP NOTE 3.375% 12/1/2027	95,248	95,248
85,000 PAR SMUCKER J M CO NOTE CALL MAKE WHOLE 3.37500% 12/15/2027	80,784	80,784
390,000 PAR STARBUCKS CORP NOTE CALL MAKE WHOLE 4.75000% 02/15/2026	391,502	391,502
115,000 PAR STATE STR CORP NOTE 1.68400% 11/18/2027	105,487	105,487
345,000 PAR STATE STR CORP NOTE 4.85700% 01/26/2026	343,365	343,365
290,000 PAR STATE STR CORP NOTE 5.27200% 08/03/2026	294,214	294,214
115,000 PAR SUMITOMO MITSUI FINANCIAL GROUP INC 3.35200% 10/18/2027 NOTE	108,948	108,948
85,000 PAR TEXAS INSTRS INC NOTE CALL MAKE WHOLE 2.90000% 11/03/2027	81,146	81,146
100,000 PAR THERMO FISHER SCIENTIFIC INC NOTE 4.80000% 11/21/2027	101,870	101,870
435,000 PAR THERMO FISHER SCIENTIFIC INC NOTE 5.00000% 12/05/2026	441,529	441,529
290,000 PAR TORONTO DOMINION BANK SER C MTN 5.53200% 07/17/2026	295,365	295,365
340,000 PAR TORONTO DOMINION BK ONT SER C MTN 5.10300% 01/09/2026	341,853	341,853
250,000 PAR TOYOTA MTR CR CORP SER B MTN 5.40000% 11/10/2025	253,863	253,863

Name of Bond	End of Year Book Value	End of Year Fair Market Value
115,000 PAR TOYOTA MTR CR CORP SER B MTN 5.45000% 11/10/2027	119,089	119,089
115,000 PAR UNITED PARCEL SVCS INC NOTE 3.05000% 11/15/2027 CALL MAKE WHOLE	110,107	110,107
345,000 PAR UNITEDHEALTH GROUP INC NOTE 2.95000% 10/15/2027	109,178	109,178
115,000 PAR UNITEDHEALTH GROUP INC NOTE 5.15000% 10/15/2025 CALL MAKE WHOLE	343,709	343,709
115,000 US BANCORP SER CC MTN 6.78700% 10/26/2027 CALL MAKE WHOLE	120,068	120,068
270,000 PAR VERIZON COMMUNICATIONS INC 0.85000% 11/20/2025 NOTE	250,900	250,900
90,000 PAR VISA INC NOTE CALL MAKE WHOLE 2.75000% 09/15/2027	85,677	85,677
115,000 PAR WASTE MGMT INC DEL NOTE CALL MAKE WHOLE 3.15000% 11/15/2027	110,083	110,083
340,000 PAR WELLS FARGO &CO SER Q MTN 2.40600% 10/30/2025	330,742	330,742
100,000 PAR WESTPAC BKG CORP NOTE 5.45700% 11/18/2027	102,530	102,530
340,000 PAR WILLIAMS COS INC NOTE CALL MAKE WHOLE 5.40000% 03/02/2026	343,397	343,397
340,000 PAR ZOETIS INC NOTE CALL MAKE WHOLE 4.50000% 11/13/2025	338,044	338,044

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1,166,235 SHARES VANGUARD S/T INV.GRADE	11,930,582	11,930,582
167,501 SHARES DFA GLOBAL REAL ESTATE SEC PORTFOLIO	1,720,230	1,720,230
18,738 SHARES ISHARES CORE S&P MID-CAP ETF	5,193,216	5,193,216
227,173 SHARES VANGUARD DEVELOPED MARKETS INDEX FUND	10,881,593	10,881,593
24.732 SHARES PACER DATA & INFRASTRUCTURE REAL	737,266	737,266
34,692 SHARES VANGUARD INTL EQUITY INDEX FDS FTSE	1,425,822	1,425,822
39,934 SHARES ISHARES GOLD TRUST	1,558,634	1,558,634
41,712 SHARES VANGUARD COMMODITY STRATEGY ADMIRAL	1,029,853	1,029,853
44,533 SHARES VANGUARD SMALL CAP INDEX ADMIRAL	4,550,828	4,550,828
786,292 SHARES LOOMIS SAYLES CORE PLUS BOND FUND	9,199,612	9,199,612
8,617 SHS SPDR SER TR S&P BIOTECH	769,411	769,411
8,639 SHARES VANGUARD INDEX FDS VANGUARD VALUE	1,291,575	1,291,575
870,138 SHARES DOUBLELINE TOTAL RETURN BOND FD	7,692,022	7,692,022
91,324 SHARES VANGUARD INSTL INDEX	35,934,089	35,934,089

TY 2023 IRS 990 e-File Render

Name:	THE ROBERT W WILSON CHARITABLE TRUST
EIN:	51-6536168
US Government Securities - End of Year Book Value:	28,310,759
US Government Securities - End of Year Fair Market Value:	28,310,759
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
1,500 SHARES BLACK DIAMOND ARBITRAGE, LTD.	FMV	1,615,225	1,615,225
2,624 SHARES SQN INVESTORS OFFSHORE LTD	FMV	1,729,392	1,729,392
4,000 SHARES BREVAN HOWARD FUND LIMITED - CLASS M USD NR	FMV	4,675,019	4,675,019
7,684 SHARES PINEHURST INSTITUTIONAL LTD.	FMV	18,399,815	18,399,815
INV IN PSHIP-WELLINGTON TRUST CTF DIVERSIFIED INFLATION HEDGES PORT	FMV	1,258,944	1,258,944
INVESTMENT IN FARALLON CAPITAL INVESTORS LP	FMV	3,450,272	3,450,272
INVESTMENT IN WISE ORIGIN BITCOIN INDEX FUND I, LP	FMV	1,137,764	1,137,764

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES IN CONNECTION WITH VARIOUS FOUNDATION MATTERS	32,831	0		32,831

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
OTHER ASSETS	105	105	105
PURCHASED BOND INTEREST		164,952	164,952

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	1,500	0		1,500
MISCELLANEOUS EXPENSES	6,339	0		6,339
MISCELLANEOUS PARTNERSHIP EXPENSES THROUGH WELLINGTON TRUST	1,928	1,928		0
OFFICE EXPENSES	18,729	7,492		11,237
MISCELLANEOUS EXPENSES THRU FARALLON PARTNERSHIP	510	510		0
OTHER INVESTMENT EXPENSES	12,039	12,039		0
MISCELLANEOUS PARTNERSHIP EXPENSES THROUGH WISE ORIGIN	9,954	9,954		0

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ORDINARY INCOME THROUGH WELLINGTON PARTNERSHIP	2,458	2,458	2,458
REALIZED LOSS ON FOREIGN CURRENCY	-793	-793	-793

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Description	Amount
UNREALIZED APPRECIATION OF INVESTMENTS CARRIED AT MARKET VALUE	5,463,201

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	585,020	585,020		0
CONSULTING FEES IN CONNECTION WITH THE GRANT TO JBS	25,192	0		25,192

TY 2023 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX ON NET INVESTMENT INCOME	95,000	0		0
FOREIGN INCOME TAXES WITHHELD FROM DIVIDENDS	30,250	30,250		0
FOREIGN INCOME TAXES WITHHELD THROUGH WELLINGTON PARTNERSHIP	6,167	6,167		0