

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.

For calendar year 2024, or tax year beginning 01-01-2024, and ending 12-31-2024

Name of foundation: THE ROBERT W WILSON CHARITABLE TRUST. A Employer identification number: 51-6536168. B Telephone number: (212) 840-3456. C If exemption application is pending, check here. D 1. Foreign organizations, check here. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here.

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

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes (cash basis only). Rows include: 1 Contributions, gifts, grants, etc., received; 2 Check if the foundation is not required to attach Sch. B; 3 Interest on savings and temporary cash investments; 4 Dividends and interest from securities; 5a Gross rents; b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10; b Gross sales price for all assets on line 6a; 7 Capital gain net income; 8 Net short-term capital gain; 9 Income modifications; 10a Gross sales less returns and allowances; b Less: Cost of goods sold; c Gross profit or (loss); 11 Other income; 12 Total. Add lines 1 through 11; 13 Compensation of officers, directors, trustees, etc.; 14 Other employee salaries and wages; 15 Pension plans, employee benefits; 16a Legal fees; b Accounting fees; c Other professional fees; 17 Interest; 18 Taxes; 19 Depreciation; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses; 24 Total operating and administrative expenses; 25 Contributions, gifts, grants paid; 26 Total expenses and disbursements; 27 Subtract line 26 from line 12; a Excess of revenue over expenses and disbursements; b Net investment income; c Adjusted net income.

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	21,963,276	27,110,413	27,110,413
	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)	28,310,759	90,193,931	90,193,931
	b Investments—corporate stock (attach schedule)	93,914,733	17,587,693	17,587,693
	c Investments—corporate bonds (attach schedule)	22,834,988	46,512,625	46,512,625
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	32,266,431	381,621	381,621
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	165,057	8,165	8,165	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	199,455,244	181,794,448	181,794,448	
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 <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	199,455,244	181,794,448	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> 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)	199,455,244	181,794,448		
30 Total liabilities and net assets/fund balances (see instructions)	199,455,244	181,794,448		

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	199,455,244
2 Enter amount from Part I, line 27a	2	3,847,606
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	203,302,850
5 Decreases not included in line 2 (itemize) ▶ _____	5	21,508,402
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	181,794,448

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include Pinehurst, Brevan Howard, Black Diamond, SQN, Wellington Partnership, Farallon F5 Investors, etc.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows correspond to items in Part IV, showing sales prices and gains/losses.

Table with 4 columns: (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), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)).

Summary rows for capital gain net income (line 2) and net short-term capital gain or loss (line 3).

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

Table for Excise Tax Based on Investment Income. Rows include exempt operating foundations (1a), tax under section 511 (2), tax based on investment income (5), credits/payments (6a-6d), total credits and payments (7), penalty (8), tax due (9), overpayment (10), and amount to be credited to 2025 estimated tax (11).

Part VI-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.
c Did the foundation file Form 1120-POL for this year?
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation. (2) On foundation managers.
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?
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?
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?
b If "Yes," has it filed a tax return on Form 990-T for this year?
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?
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?
7 Did the foundation have at least \$5,000 in assets at any time during the year?
8a Enter the states to which the foundation reports or with which it is registered (see instructions)
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?
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 2024 or the taxable year beginning in 2024?
10 Did any persons become substantial contributors during the tax year?
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)?
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address

Table with 3 columns: Question ID, Yes, No. Rows 1a through 13.

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

16 At any time during calendar year 2024, 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country.

Table with 3 columns: Question ID, Yes, No. Rows 16.

Part VI-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.

- 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?
 - (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
 - (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
 - (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
 - (5)** Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
 - (6)** Agree to pay money or property to a government official? (**Exception.** Check "No" 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.)
- 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
- 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 exempted acts, that were not corrected before the first day of the tax year beginning in 2024?
- 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 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024?
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.)
 - 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?
- b** If "Yes," did it have excess business holdings in 2024 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 2024.)
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- 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 2024?

	Yes	No
1a(1)		No
1a(2)		No
1a(3)		No
1a(4)	Yes	
1a(5)		No
1a(6)		No
1b		No
1d		No
2a		No
2b		
3a		No
3b		
4a		No
4b		No

Part VI-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))?
 - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
 - (3)** Provide a grant to an individual for travel, study, or other similar purposes?
 - (4)** Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions
 - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
- 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
- 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?
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?
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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?
- b** If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
- 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
5a(1)		No
5a(2)		No
5a(3)		No
5a(4)	Yes	
5a(5)		No
5b		No
5d	Yes	
6a		No
6b		No
7a		No
7b		
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	749,828	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
NONE				

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	424,083
ANCHIN BLOCK & ANCHIN LLP 3 TIMES SQUARE NEW YORK, NY 10036	ACCTG, TAX, CONSULTG	399,161
BAKER MCKENZIE 452 5TH AVE NEW YORK, NY 10018	LEGAL	114,537
BRECKINRIDGE CAPITAL ADVISORS 200 HIGH STREET SUITE 700 BOSTON, MA 02110	INVESTMENT ADVISOR	58,847

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	158,529,979
b	Average of monthly cash balances.	1b	25,028,457
c	Fair market value of all other assets (see instructions).	1c	7,116,575
d	Total (add lines 1a, b, and c).	1d	190,675,011
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	190,675,011
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	2,860,125
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	187,814,886
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	9,390,744

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	9,390,744
2a	Tax on investment income for 2024 from Part V, line 5.	2a	439,840
b	Income tax for 2024. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	439,840
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	8,950,904
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	8,950,904
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	8,950,904

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	27,212,396
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	27,212,396

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
1 Distributable amount for 2024 from Part X, line 7				8,950,904
2 Undistributed income, if any, as of the end of 2024:				
a Enter amount for 2023 only.			0	
b Total for prior years: 20 ____, 20 ____, 20 ____		0		
3 Excess distributions carryover, if any, to 2024:				
a From 2019.	8,997,237			
b From 2020.	9,164,869			
c From 2021.	6,070,364			
d From 2022.	4,727,062			
e From 2023.	3,712,386			
f Total of lines 3a through e.	32,671,918			
4 Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ <u>27,212,396</u>				
a Applied to 2023, 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 2024 distributable amount				8,950,904
e Remaining amount distributed out of corpus	18,261,492			
5 Excess distributions carryover applied to 2024. (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	50,933,410			
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 2023. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025				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 2019 not applied on line 5 or line 7 (see instructions)	8,997,237			
9 Excess distributions carryover to 2025. Subtract lines 7 and 8 from line 6a	41,936,173			
10 Analysis of line 9:				
a Excess from 2020	9,164,869			
b Excess from 2021	6,070,364			
c Excess from 2022.	4,727,062			
d Excess from 2023	3,712,386			
e Excess from 2024	18,261,492			

Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9)

Table with 5 columns: (a) 2024, (b) 2023, (c) 2022, (d) 2021, (e) Total. Rows include questions 1a-1b, 2a-2e, 3a-3c, and 4a-4d regarding private operating foundation status and alternative tests.

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:

990-PF (2024)					Page 1
Part 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 Paid during the year					
54 BELOW INC 254 W 54TH STREET 10TH FLOOR NEW YORK,NY 10019		PC	GENERAL SUPPORT	335,001	
ACLU FOUNDATION 125 BROAD STREET 18TH FLOOR NEW YORK,NY 10004		PC	GENERAL SUPPORT	25,000	
AMERICAN BIRD CONSERVANCY 4249 LOUDON AVENUE PO BOX 249 THE PLAINS,VA 20198		PC	GENERAL SUPPORT	280,000	
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	
BEDFORD PLAYHOUSE PO BOX 777 BEDFORD,NY 10506		PC	GENERAL SUPPORT	5,000	
BONE MARROW CANCER FOUNDATION 515 MADISON AVENUE SUITE 1130 NEW YORK,NY 10022		PC	GENERAL SUPPORT	10,000	
BOTTOMLESS CLOSET 1 WEST 34TH ST 5TH FL NEW YORK,NY 10001		PC	GENERAL SUPPORT	25,000	
BOYS AND GIRLS CLUB 1275 PEACHTREE STREET ATLANTA,GA 303093506		PC	GENERAL SUPPORT	5,000	
BRIDGE FUND OF NY 271 MADISON AVENUE NEW YORK,NY 10016		PC	GENERAL SUPPORT	5,000	
BYRD HOFFMAN WATERMILL FOUNDATION 39 WATERMILL TOWN RD WATER MILL,NY 11976		PC	GENERAL SUPPORT	5,000	
CEC ARTSLINK 28 HUBERT STREET NEW YORK,NY 10013		PC	GENERAL SUPPORT	10,000	
CENTRAL PARK CONSERVANCY 717 FIFTH AVENUE NEW YORK,NY 10022		PC	GENERAL SUPPORT	2,600,000	
CENTRAL SYNAGOGUE 123 E 55TH STREET NEW YORK,NY 10022		PC	GENERAL SUPPORT	68,750	
CHILDRENS ACADEMY 317 EAST 50TH ST NEW YORK,NY 10022		PC	GENERAL SUPPORT	10,000	
CHILDRENS AID SOCIETY 117 WEST 124TH ST NEW YORK,NY 10027		PC	GENERAL SUPPORT	15,000	
CHRISTOPHER AND DANA REEVE FOUNDATION 636 MORRIS TURNPIKE SHORT HILLS,NJ 07078		PC	GENERAL SUPPORT	30,000	
CITY HARVEST 6 EAST 32ND ST NEW YORK,NY 10016		PC	GENERAL SUPPORT	5,000	
CIVIC AND CULTURAL RESTORATION PO BOX 68 5 MAIN ST HOOSICK FALLS,NY 12090		PC	GENERAL SUPPORT	40,000	
CLUBBED THUMB 440 LAFAYETTE STREET NEW YORK,NY 10003		PC	GENERAL SUPPORT	15,000	
CONSERVATION STRATEGY FUND 1800 MASSACHUSETTS AVE NW WASHINGTON,DC 20036		PC	GENERAL SUPPORT	2,500	
DEERFIELD VALLEY FOOD PANTRY PO BOX 1743 WILMINGTON,VT 05363		PC	GENERAL SUPPORT	2,500	
DRUG POLICY ALLIANCE 131 WEST 33RD STREET NEW YORK,NY 10001		PC	GENERAL SUPPORT	600,000	
DUKE LEMUR CENTER PO BOX 90581 DURHAM,NC 277080581		PC	GENERAL SUPPORT	10,000	
ENVIRONMENTAL DEFENSE FUND 257 PARK AVE SOUTH NEW YORK,NY 10010		PC	GENERAL SUPPORT	1,819,484	
FOOD & ENVIRONMENT REPORTING NETWORK 580 FIFTH AVE NEW YORK,NY 10036		PC	GENERAL SUPPORT	5,000	
FOSTER PARROTS LTD 35 VERNON STREET ROCKLAND,MA 02370		PC	GENERAL SUPPORT	2,500	
FRIENDS OF LACHAT 31 FANTON HILL RD WESTON,CT 06883		PC	GENERAL SUPPORT	10,000	
FRIENDS OF ODELL HOUSE ROCHAMBEAU HEADQUARTERS 14 ROCHAMBEAU DRIVE HARTSDALE,NY 10530		PC	GENERAL SUPPORT	10,000	
GRASSROOTS GROCERY 1760 2ND AVE NEW YORK,NY 10128		PC	GENERAL SUPPORT	10,000	
HASTINGS CENTER 21 MALCOM GORDON RD GARRISON,NY 10524		PC	GENERAL SUPPORT	135,000	
HEART PO BOX 738 MAMARONECK,NY 10543		PC	GENERAL SUPPORT	2,500	
HIRE HEROES USA 13010 MORRIS RD ALPHARETTA,GA 30004		PC	GENERAL SUPPORT	10,000	
HISTORIC HOUSE TRUST 830 FIFTH AVE NEW YORK,NY 10065		PC	GENERAL SUPPORT	5,000	
HOUR CHIDLREN 36-11 12TH ST LONG ISLAND CITY,NY 11106		PC	GENERAL SUPPORT	10,000	
INNER CITY SCHOLARSHIP PROGRAM 1011 FIRST AVE NEW YORK,NY 10022		PC	GENERAL SUPPORT	25,000	
JAZZ FOUNDATION OF AMERICA 247 WEST 37TH STREET NEW YORK,NY 10018		PC	GENERAL SUPPORT	10,000	
JEWISH FEDERATION OF PALM BEACH 1 HARVARD CIR 100 WEST PALM BEACH,FL 33409		PC	GENERAL SUPPORT	100,000	
JEWISH INTERACTIVE 1856 N NOB HILL RD PLANTATION,FL 33322		PC	GENERAL SUPPORT	5,000	
JUILLIARD SCHOOL 60 LINCOLN CENTER PLAZA NEW YORK,NY 10023		PC	GENERAL SUPPORT	25,000	
LEUKEMIA & LYMPHOMA SOCIETY 3 INTERNATIONAL DRIVE RYE BROOK,NY 10573		PC	GENERAL SUPPORT	2,500	
LUV MICHAEL 2 WALKER STREET NEW YORK,NY 10013		PC	GENERAL SUPPORT	10,000	
MANHATTAN CLASS 511 WEST 52ND ST NEW YORK,NY 10019		PC	GENERAL SUPPORT	10,000	
MASS MOCA 1040 MASS MOCA WAY NORTH ADAMS,MA 01247		PC	GENERAL SUPPORT	550,000	
METROPOLITAN OPERA 30 LINCOLN CENTER NEW YORK,NY 10023		PC	GENERAL SUPPORT	1,250,000	
MOHONK PRESERVE 3197 ROUTE 44-55 GARDINER,NY 12525		PC	GENERAL SUPPORT	6,500	
NATIONAL MULTIPLE SCLEROSIS SOCIETY PO BOX 91891 WASHINGTON,DC 20090		PC	GENERAL SUPPORT	1,000	
MUNICIPAL ART SOCIETY 488 MADISON AVE NEW YORK,NY 10022		PC	GENERAL SUPPORT	25,000	
MUSICIANS ON CALL 618 GRASSMERE PARK NASHVILLE,TN 37211		PC	GENERAL SUPPORT	10,000	
NATURE & CULTURE INTERNATIONAL 1400 MAIDEN LANE DEL MAR,CA 92014		PC	GENERAL SUPPORT	25,000	
NATURE CONSERVANCY 322 8TH AVENUE 14TH FL NEW YORK,NY 10001		PC	GENERAL SUPPORT	8,655,718	
NEW YORK LANDMARKS CONSERVANCY ONE WHITEHALL STREET NEW YORK,NY 10004		PC	GENERAL SUPPORT	25,000	
NEW YORK PUBLIC LIBRARY 270 MADISON AVENUE NEW YORK,NY 10016		PC	GENERAL SUPPORT	1,044,750	
NY PHILHARMONIC 10 LINCOLN CENTER PLAZA NEW YORK,NY 10023		PC	GENERAL SUPPORT	25,000	
NYC BIRD ALLIANCE 71 WEST 23RD STREET SUITE 1523 NEW YORK,NY 10010		PC	GENERAL SUPPORT	6,500	
PEF ISRAEL 630 THIRD AVE NEW YORK,NY 10017		PC	GENERAL SUPPORT	5,000	
PLANNED PARENTHOOD PO BOX 97166 WASHINGTON,DC 20090		PC	GENERAL SUPPORT	10,000	
CONTEMPORARY ARTS FOUNDATION INC (RUBELL MUSEUM) 1100 NW 23 ST MIAMI,FL 33127		POF	GENERAL SUPPORT	10,000	
SAMARITAN'S PURSE PO BOX 3000 BOONE,NC 28607		PC	GENERAL SUPPORT	5,000	
SCENIC HUDSON 85 CIVIC CENTER PLAZA POUGHKEEPSIE,NY 12601		PC	GENERAL SUPPORT	10,000	
ST ANN'S WAREHOUSE 45 WATER STREET BROOKLYN,NY 11201		PC	GENERAL SUPPORT	125,000	
STAND WITH US 1801 W OLYMPIC BLVD PASADENA,CA 911992215		PC	GENERAL SUPPORT	5,000	
STEM TEACHERS NYC 245 WEST 107TH STREET NEW YORK,NY 10025		PC	GENERAL SUPPORT	10,000	
SUNRISE DAY CAMP 11 NEIL COURT OCEANSIDE,NY 11572		PC	GENERAL SUPPORT	5,000	
TADA FOUNDATION 2335 CHESHIRE BRIDGE ROAD ATLANTA,GA 30324		PC	GENERAL SUPPORT	2,500	
TENEMENT MUSEUM 103 ORCHARD ST NEW YORK,NY 10002		PC	GENERAL SUPPORT	10,000	
THE HONEYCOMB PROJECT 1030 W NORTH AVE CHICAGO,IL 60642		PC	GENERAL SUPPORT	6,500	
THE TOMMY FUND PO BOX 8295 NEW YORK,NY 10016		PC	GENERAL SUPPORT	2,500	
UJA NEW YORK PO BOX 4227 NEW YORK,NY 10261		PC	GENERAL SUPPORT	100,000	
UPSTREAM ALLIANCE 1867 LINDAMOOD DRIVE ANNAPOLIS,MD 21401		PC	GENERAL SUPPORT	6,500	
URBAN VISION ALLIANCE 1383 MASONIC AVENUE SAN FRANCISCO,CA 94117		PC	GENERAL SUPPORT	2,500	
VASCULITIS FOUNDATION PO BOX 28660 KANSAS CITY,MO 64188		PC	GENERAL SUPPORT	2,500	
VERA INSTITUTE OF JUSTICE 34 35TH ST BROOKLYN,NY 11232		PC	GENERAL SUPPORT	1,575,000	
WCPE CLASSICAL RADIO PO BOX 828 WAKE FOREST,NC 27588		PC	GENERAL SUPPORT	5,000	
WESTCHESTER LAND TRUST 403 HARRIS RD BEDFORD HILLS,NY 10507		PC	GENERAL SUPPORT	5,000	
WHITNEY MUSEUM OF AMERICAN ART 99 GANSEVOORT STREET NEW YORK,NY 10014		PC	GENERAL SUPPORT	1,100,000	
WORLD MONUMENTS FUND 600 FIFTH AVENUE NEW YORK,NY 10020		PC	GENERAL SUPPORT	4,919,558	
MORGAN PRESSEL FOUNDATION 7933 YORKSIRE CT BOCA RATON,FL 33496		PC	GENERAL SUPPORT	5,000	
ROCKEFELLER UNIVERSITY 1230 YORK AVENUE NEW YORK,NY 10065		PC	GENERAL SUPPORT	250,000	
AMERICAN BALLET THEATER 890 BROADWAY NEW YORK,NY 10003		PC	GENERAL SUPPORT	1,000	
INSTITUTE FOR JUSTICE 901 N GLEBE RD ARLINGTON,VA 22203		PC	GENERAL SUPPORT	50,000	
MT SINAI HOSPITAL ONE GUSTAVE L LEVY PLACE PO BOX 1049 NEW YORK,NY 10029		PC	GENERAL SUPPORT	5,000	
Total			3a	26,193,961	
b Approved for future payment					
Total			3b		

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

1 Program service revenue:

- a
b
c
d
e
f

g Fees and contracts from government agencies

2 Membership dues and assessments

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

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

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
b ORDINARY INCOME THROUGH SQN PARTNERSHIP
c MISCELLANEOUS INCOME
d CURRENCY GAIN THROUGH SQN PARTNERSHIP
e

12 Subtotal. Add columns (b), (d), and (e)

13 Total. Add line 12, columns (b), (d), and (e)

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

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include various income categories and a total row.

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

Table with 2 columns: 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.

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2024 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	399,161	159,664		239,497

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

TY 2024 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
CONTEMPORARY ARTS FOUNDATION INC (RUBELL MUSEUM)	1100 NW 23 ST MIAMI, FL 33127	2024-04- 05	10,000	GENERAL SUPPORT	10,000	NO KNOWLEDGE OF ANY DIVERSIONS OF THE FUNDS FROM THE CHARITABLE PURPOSE.	11/4/25	2025-11-05	

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) - 12/31/2023 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. . . . 18,399,81522 ADD LINES 20 AND 21 18,399,81523 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 6,013,74225 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 6,013,742
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) - 12/31/2023 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 1,615,225 22 ADD LINES 20 AND 21 1,615,225 23 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 19 115,22525 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 115,225

TY 2024 IRS 990 e-File Render		
Name: THE ROBERT W WILSON CHARITABLE TRUST EIN: 51-6536168		
Name of Bond	End of Year Book Value	End of Year Fair Market Value
ABBVIE INC 3.2% 5/14/26	486,298	486,298
ALEXANDRIA REAL ESTATE E 3.95% 1/15/27	491,845	491,845
AMAZON.COM INC 4.55% 12/1/27	100,625	100,625
AMERICAN ELECTRIC POWER 1% 11/1/25	436,032	436,032
AMERICAN ELECTRIC POWER 3.2% 11/13/27	81,422	81,422
AMERICAN EXPRESS CO 4.9% 2/13/26	341,098	341,098
AMERICAN EXPRESS CO 5.85% 11/5/27	118,490	118,490
AMERICAN EXPRESS CO 6.338% 10/30/26	293,584	293,584
AMERICAN HONDA FINANCE 5.25% 7/7/26	438,249	438,249
AMERICAN TOWER CORP 1.6% 4/15/26	307,370	307,370
AMGEN INC 2.6% 8/19/26	478,977	478,977
AMGEN INC 3.2% 11/2/27	125,009	125,009
AON GLOBAL LTD 3.875% 12/15/25	540,825	540,825
APPLE INC 2.05% 9/11/26	384,872	384,872
APPLE INC 3% 11/13/27	82,058	82,058
APPLE INC 3.35% 2/9/27	396,657	396,657
ASTRAZENECA PLC 3.125% 6/12/27	619,584	619,584
AT&T INC 2.3% BONDS DUE 6/1/27	816,404	816,404
BANK OF AMERICA CORP 3.248% 10/21/27	110,846	110,846
BANK OF AMERICA NA 5.526% 8/18/26	299,092	299,092
BANK OF MONTREAL 4.7% BONDS DUE 9/14/27	731,370	731,370
BANK OF NOVA SCOTIA 4.75% 2/2/26	340,218	340,218
BANK OF NOVA SCOTIA 5.35% 12/7/26	607,872	607,872
BHP BILLITON FIN USA LTD 4.875% 2/27/26	350,914	350,914
BOSTON PROPERTIES LP 3.65% 2/1/26	202,011	202,011
BOSTON PROPERTIES LP 6.75% 12/1/27	52,166	52,166
BP CAP MARKETS AMERICA 3.119% 5/4/26	304,454	304,454
BP CAPITAL MARKETS PLC 3.279% 9/19/27	304,457	304,457
BRISTOL-MYERS SQUIBB CO 0.75% 11/13/25	329,443	329,443
BRISTOL-MYERS SQUIBB CO 3.45% 11/15/27	111,703	111,703
BROADCOM INC 3.15% 11/15/25	394,812	394,812
CANADIAN IMPERIAL BANK 6/22/26	380,724	380,724
CAPITAL ONE FINANCIAL CO 1.878% 11/2/27	415,756	415,756
CATERPILLAR FINL SERVICE 3.6% 8/12/27	699,270	699,270
CHUBB INA HOLDINGS LLC 3.35% 5/3/26	467,552	467,552
CITIGROUP INC 1.122% 1/28/27	422,466	422,466
CITIGROUP INC 3.7% 1/12/26	336,841	336,841
CNH INDUSTRIAL CAP LLC 1.45% 7/15/26	304,176	304,176
CNH INDUSTRIAL NV 3.85% 11/15/27	68,347	68,347
COMCAST CORP 3.3% 2/1/27	253,084	253,084
COMCAST CORP 5.35% 11/15/27	101,907	101,907
CONSTELLATION BRANDS INC 3.7% 12/6/26	407,804	407,804
CVS HEALTH CORP 1.3% 8/21/27	181,086	181,086
CVS HEALTH CORP 5% 2/20/26	399,664	399,664
DOMINION ENERGY INC 1.45%4/15/26	383,592	383,592
DUKE ENERGY CORP 5% 12/8/25	511,301	511,301
DUKE ENERGY CORP 5% 12/8/27	115,857	115,857
ECOLAB INC 3.25% 12/1/27	289,014	289,014
ELEVANCE HEALTH INC 1.5% 3/15/26	327,393	327,393
ELEVANCE HEALTH INC 3.65% 12/1/27	131,306	131,306
ELEVANCE HEALTH INC 5.35% 10/15/25	200,798	200,798
ENBRIDGE INC 4.25% 12/1/26	554,960	554,960
ENERGY TRANSFER LP 6.05% 12/1/26	280,984	280,984
EQUINIX INC 2.9% 11/18/26	391,129	391,129
ESTEE LAUDER CO INC 3.15% 3/15/27	484,375	484,375
EVERSOURCE ENERGY 4.75% 5/15/26	339,531	339,531
EXELON CORP 3.4% 4/15/26	413,053	413,053
GENERAL DYNAMICS CORP 2.625% 11/15/27	109,078	109,078
GENERAL MILLS INC 4.7% 1/30/27	199,904	199,904
GENERAL MILLS INC 5.241% 1/8/25	225,027	225,027
GENERAL MOTORS CO 6.8% 10/1/27	177,468	177,468
GENERAL MOTORS FINL CO 6.05% 10/10/25	247,053	247,053
GILEAD SCIENCES INC 1.2% 10/1/27	118,520	118,520
GOLDMAN SACHS GROUP INC 0.855% 2/12/26	338,324	338,324
GOLDMAN SACHS GROUP INC 5.798% 8/10/26	291,618	291,618
HOME DEPOT INC 2.8% BONDS 9/14/27	57,458	57,458
HOME DEPOT INC 3% 4/1/26	412,532	412,532
HOME DEPOT INC 4.95% 9/30/26	126,090	126,090
HONDA MOTOR CO LTD 2.534% 3/10/27	272,312	272,312
INTERCONTINENTALEXCHANGE 3.75% 12/1/25	213,381	213,381
INTERCONTINENTALEXCHANGE 4% 9/15/27	359,467	359,467
JM SMUCKER CO 3.375% 12/15/27	82,261	82,261
JOHN DEERE CAPITAL CORP 4.15% 9/15/27	277,186	277,186
JOHN DEERE CAPITAL CORP 4.75% 6/8/26	321,341	321,341
JPMORGAN CHASE & CO 1.045% 11/19/26	420,958	420,958
JPMORGAN CHASE & CO 6.07% 10/22/27	153,500	153,500
LLOYDS BANKING GROUP PLC 1.627% 5/11/27	573,792	573,792
LOCKHEED MARTIN CORP 5.1% 11/15/27	101,559	101,559
LOWE'S COS INC 2.5% 4/15/26	390,012	390,012
MARTIN MARIETTA MATERIAL 3.5% 12/15/27	72,407	72,407
MICROSOFT CORP 3.3% 2/6/27	616,531	616,531
MINITUBISHI UFJ FIN GRP 1.64% 10/13/27	189,218	189,218
MINITUBISHI UFJ FIN GRP 3.677% BONDS DUE 2/22/27	494,501	494,501
MORGAN STANLEY 1.593% 5/4/27	421,793	421,793
MORGAN STANLEY 3.875% DUE 1/27/26	426,754	426,754
MPLX LP 4.25% 12/1/27	63,995	63,995
NATIONAL RURAL UTIL COOP 4.45% 3/13/26	339,391	339,391
NEXTERA ENERGY CAPITAL 4.625% DUE 7/15/27	678,973	678,973
NIKE INC 2.75% 3/27/27	409,602	409,602
NSTAR ELECTRIC CO 3.2% 5/15/27	405,720	405,720
ORACLE CORP 3.25% 11/15/27	105,703	105,703
ORACLE CORP 5.8% 11/10/25	489,637	489,637
O'REILLY AUTOMOTIVE INC 3.6% 9/1/27	87,321	87,321
PEPSICO INC 3% 10/15/27	110,697	110,697
PEPSICO INC 5.125% 11/10/26	774,471	774,471
PFIZER INVESTMENT ENTER 4.45% 5/19/26	439,314	439,314
PHILLIPS 66 CO 4.95% 12/1/27	85,679	85,679
PNC FINANCIAL SERVICES 6.615% 10/20/27	102,942	102,942
PUBLIC SERVICE ENTERPRIS 5.85% 11/15/27	154,188	154,188
REALTY INCOME CORP 3.95% 8/15/27	363,869	363,869
REALTY INCOME CORP 4.625% 11/1/25	339,643	339,643
ROYAL BANK OF CANADA 4.875% 1/19/27	702,548	702,548
ROYAL BANK OF CANADA 6% 11/1/27	103,259	103,259
RTX CORP 5.75% 11/8/26	407,112	407,112
SEMPRA 3.25% 6/15/27	346,388	346,388
SEMPRA 5.4% 8/1/26	478,852	478,852
SHELL INTERNATIONAL FIN 2.875% 5/10/26	430,412	430,412
SIMON PROPERTY GROUP LP 3.3% 1/15/26	345,219	345,219
SIMON PROPERTY GROUP LP 3.375% 12/1/27	96,746	96,746
SIMON PROPERTY GROUP LP 3.375% 6/15/27	204,131	204,131
STARBUCKS CORP 4.75% 2/15/26	390,952	390,952
STATE STREET CORP 1.684% 11/18/27	108,815	108,815
STATE STREET CORP 4.857% 1/26/26	344,917	344,917
STATE STREET CORP 5.272% 8/3/26	292,851	292,851
SUMITOMO MITSUI FINL GRP 3.352% 10/18/27	110,798	110,798
SUMITOMO MITSUI FINL GRP 3.364% 7/12/27	464,947	464,947
TEXAS INSTRUMENTS INC 1.125% 9/15/26	472,985	472,985
TEXAS INSTRUMENTS INC 2.9% 11/3/27	81,466	81,466
THERMO FISHER SCIENTIFIC 4.8% 11/21/27	100,682	100,682
THERMO FISHER SCIENTIFIC 5% 12/5/26	438,745	438,745
T-MOBILE USA INC 3.75% 4/15/27	517,720	517,720
TORONTO DOMINION BANK 1.95% 1/12/27	208,030	208,030
TORONTO-DOMINION BANK 5.103% 1/9/26	341,445	341,445
TORONTO-DOMINION BANK 5.532% 7/17/26	293,347	293,347
TOYOTA MOTOR CREDIT CORP 3.05% 3/22/27	203,223	203,223
TOYOTA MOTOR CREDIT CORP 5.4% 11/10/25	251,890	251,890
TOYOTA MOTOR CREDIT CORP 5.45% 11/10/27	117,668	117,668
TRUIST FINANCIAL CORP 1.267% 3/2/27	210,938	210,938
TRUIST FINANCIAL CORP 4.26% 7/28/26	373,380	373,380
TWDC ENTERPRISES 18 CORP 2.95% 6/15/27	578,232	578,232
UNITED PARCEL SERVICE 3.05% 11/15/27	110,547	110,547
UNITEDHEALTH GROUP INC 5.15% 10/15/25	341,771	341,771
UNITEDHEALTH GROUP INC 10/15/27	282,333	282,333
US BANCORP 2.375% 7/22/26	381,835	381,835
US BANCORP 6.787% 10/26/27	273,750	273,750
VISA INC 2.75% 9/15/27	121,497	121,497
VISA INC 3.15% 12/14/25	321,289	321,289
WALMART INC 1.05% 9/17/26	406,754	406,754
WASTE MANAGEMENT INC 3.15% 11/15/27	298,118	298,118
WELLS FARGO BANK NA 5.254% 12/11/26	293,323	293,323
WESTPAC BANKING CORP 1.15% 6/3/26	305,190	305,190
WESTPAC BANKING CORP 5.457% 11/18/27	102,278	102,278
WILLIAMS COMPANIES INC 5.4% 3/2/26	342,309	342,309
WILLIS NORTH AMERICA INC 4.65% 6/15/27	548,625	548,625
XCEL ENERGY INC 3.35% 12/1/26	613,941	613,941
ZOETIS INC 3% 9/12/27	229,970	229,970
ZOETIS INC 4.5% 11/13/25	339,480	339,480

TY 2024 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
DOUBLELINE TOTAL RETURN BOND FD	3,879,341	3,879,341
LOOMIS SAYLES CORE PLUS BOND FUND	5,256,493	5,256,493
VANGUARD S/T INV.GRADE	8,451,859	8,451,859

TY 2024 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

**US Government Securities - End of
Year Book Value:**

90,193,931

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

90,193,931

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

0

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

0

TY 2024 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
FARALLON CAPITAL INVESTORS LP	FMV	95,653	95,653
SQN INVESTORS MASTER FUND, LP	FMV	285,968	285,968

TY 2024 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	118,602	0		118,602

TY 2024 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	8,060	8,060

TY 2024 IRS 990 e-File Render

Name: THE ROBERT W WILSON CHARITABLE TRUST

EIN: 51-6536168

Description	Amount
UNREALIZED DEPRECIATION OF INVESTMENTS CARRIED AT MARKET VALUE	21,508,402

TY 2024 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
OFFICE EXPENSES	36,369	2,498		33,871
MISCELLANEOUS PARTNERSHIP EXPENSES THROUGH WISE ORIGIN	552	0		552
MISCELLANEOUS EXPENSES THROUGH SQN PARTNERSHIP	189	189		0
OTHER INVESTMENT EXPENSES	4,168	4,168		0
MISCELLANEOUS PARTNERSHIP EXPENSES THROUGH WELLINGTON TRUST	58	58		0
MISCELLANEOUS PARTNERSHIP EXPENSES THROUGH FARALLON F5 INVESTORS I, LP	79	79		0

TY 2024 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	131	131	131
ORDINARY INCOME THROUGH SQN PARTNERSHIP	8,415	8,415	8,415
MISCELLANEOUS INCOME	667	667	667
CURRENCY GAIN THROUGH SQN PARTNERSHIP	1,773	1,773	1,773

TY 2024 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	489,467	489,467		0
SECRETARIAL SERVICES	11,236	0		11,236

TY 2024 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	575,000	0		0
FOREIGN INCOME TAXES WITHHELD ON DIVIDEND INCOME	71	71		0