Name of foundation
THE RONDA E. STRYKER AND WILLIAM D. JOHNSTON FOUNDATION
Number and street (or P.O. box number if mail is not delivered to street address) 211 SOUTH ROSE STREET
City or town, state or province, country, and ZIP or foreign postal code KALAMAZOO, MI 49007


Part I $\begin{aligned} & \text { Analysis of Revenue and Expenses }\end{aligned}$ (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

|  | 1 | Contributions, gifts, grants, etc., received $\ldots .$. |
| :--- | :--- | :--- |
| 2 | Check | X |
| if the foundation is notrequired to attach Sch |  |  |

$\mathbf{2} \begin{aligned} & \text { Check } \mathbf{X} \text { if the foundation is not } \\ & \mathbf{3}\end{aligned} \begin{aligned} & \text { Interest on savings and temporary } \\ & \text { cash investments }\end{aligned}$
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 arsets on line 6 a ...... $7,012,812$.
7 Capital gain net income (from Part IV, line 2)
8 Net short-term capital gain
9 Income modifications Gross sales less returns Gross sales less
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
Operating and Administrative Expenses
16a Legal fees .............................ST
b Accounting fees ...................STMT 3
c Other professional fees ......STMT 4
7 Interest
18 Taxes.
19 Depreciation and depletion
20 Occupancy
21 Travel, conferences, and meetings
22 Printing and publications
23 Other expenses
STMT
24 Total operating and administrative
expenses. Add lines 13 through 23
25 Contributions, gifts, grants paid
26 Total expenses and disbursements. Add lines 24 and 25
27 Subtract line 26 from line 12:
a Excess of revenue over expenses and disbursements
b Net investment income (if negative, enter -0-).
C Adjusted net income (if negative, enter $-0-$ ).

| (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitibuele purposes (cash basis only) |
| :---: | :---: | :---: | :---: |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| 1,260,723. | 1,258,862. |  | STATEMENT 1 |
|  |  |  |  |
|  |  |  |  |
| 3,739,252. |  |  |  |
|  |  |  |  |
|  | 7,012,300. |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| 4,999,975. | 8,271,162. | 0. |  |
| 102,557. | 0 . | 0. | 102,557. |
|  |  |  |  |
|  |  |  |  |
| 50,231. | 0. | 0. | 50,231. |
| 3,845. | 1,923. | 0. | 1,922. |
| 737,272. | 344,276. | 0. | 410,568. |
|  |  |  |  |
| 165,462. | 0. | 0. | 0 . |
| 628. | 0. | 418. |  |
|  |  |  |  |
| 2,383. | 0. | 0. | 2,383. |
|  |  |  |  |
| 46,529. | 0. | 0. | 45,706. |
| 1,108,907. | 346,199. | 418. | 613,367. |
| 38,999,673. |  |  | 38,999,673. |
| 40,108,580. | 346,199. | 418. | 39,613,040. |
| -35,108,605. |  |  |  |
|  | 7,924,963. |  |  |
|  |  | 0. |  |



## 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)
2 Enter amount from Part I, line 27a
3 Other increases not included in line 2 (itemize) S SEE STATEMENT 7
4 Add lines 1, 2, and 3
5 Decreases not included in line 2 (itemize)
6 \text { Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29}
\begin{tabular}{r|r} 
& \\
1 & \(62,452,230\). \\
\hline 2 & \(-35,108,605\). \\
\hline 3 & \(19,044,425\). \\
\hline 4 & \(46,388,050\). \\
\hline 5 & 0. \\
\hline 6 & \(46,388,050\). \\
\multicolumn{1}{|r}{} & Form 990-PF (2019)
\end{tabular}
```

THE RONDA E. STRYKER AND
Form 990-PF (2019) WILLIAM D. JOHNSTON FOUNDATION
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| Part IV | Capital Gains and Losses for Tax on Investment Income |
| :--- | :--- |


| (a) List and describe the kind(s) of property sold (for example, real estate, <br> 2 -story brick warehouse; or common stock, 200 shs. MLC Co.) |  |  |  |  | $\stackrel{\text { How }}{\substack{- \\ \text { - } \\ \text { D } \\ \hline}}$ | $\begin{aligned} & \hline \text { (c) Date acquired } \\ & \text { (mo., day, yr.) } \end{aligned}$ | $\begin{aligned} & \text { (d) Date sold } \\ & \text { (mo., day, yr.) } \end{aligned}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 1a STRYKER CORPORATION - 9400 SHS |  |  |  |  |  | 07/25/76 | 04/23/19 |
|  | STRYKER CORPORA | ION - 5074 S | SHS |  |  | 07/25/76 | 06/14/19 |
| c | STRYKER CORPORA | ION - 5000 S | SHS |  |  | 07/25/76 | 07/19/19 |
|  | STRYKER CORPORA | ION - 4671 S | SHS |  |  | 07/25/76 | 07/30/19 |
| STRYKER CORPOR <br> (e) Gross sales price <br> $1.754,004$ |  | TION - 10600 SHS |  |  |  | 07/25/76 | 12/18/19 |
|  |  | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale |  | (h) Gain or (loss) ((e) plus (f) minus (g)) |  |  |
|  |  |  | 138. |  | 1,753,866. |  |  |
| b | 999,232. |  | 75. |  | 1,999,157. |  |  |
| c | 1,050,364. |  | 74. |  | 1,050,290. |  |  |
| d | 998,779. |  | $\begin{array}{r} 69 . \\ 156 . \end{array}$ |  | 998,710. |  |  |
| e | e 2,210,433. |  |  |  | 2,210,277. |  |  |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69. |  |  |  |  | (I) Gains (Col. (h) gain minus col. (k), but not less than $-0-$ ) or Losses (from col. (h)) |  |  |
| (i) FMV as of 12/31/69 |  | (j) Adjusted basis as of $12 / 31 / 69$ | $\begin{aligned} & \hline \text { (k) Excess of col. (i) } \\ & \text { over col. (j), if any } \end{aligned}$ |  |  |  |  |
| a |  |  |  |  | 1,753,866. |  |  |
| b |  |  |  |  | 999,157. |  |  |
| c |  |  |  |  | 1,050,290. |  |  |
|  |  |  |  |  | 998,710. |  |  |
|  |  |  |  |  | 2,210,277. |  |  |
|  |  |  |  |  | 2 | 7,012,300. |  |
|  |  |  |  |  | 3 | N/A |  |


\section*{| Part V | Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income |
| :--- | :--- |}

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)
If section 4940(d)(2) applies, leave this part blank.
Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?
If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.
1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

|  | (a) Base period years Calendar year (or tax year beginning in) | (b) <br> Adjusted qualifying distributions | (c) <br> Net value of noncharitable-use assets | (d)Distribution ratio(col. (b) divided by col. (c)) |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | 2018 | 36,612,886. | 127,031,885. |  | . 288218 |
|  | 2017 | 19,901,121. | 131,782,125. |  | . 151015 |
|  | 2016 | 3,033,337. | 110,374,157. |  | . 027482 |
|  | 2015 | 3,811,301. | 54,623,003. |  | . 069775 |
|  | 2014 | 2,489,635. | 2,941,030. |  | . 846518 |
| 2 | Total of line 1, column (d) |  |  | 2 | 1.383008 |
| 3 | Average distribution ratio for the 5 -year base period - divide the total on line 2 by 5.0 , or by the number of years the foundation has been in existence if less than 5 years $\qquad$ |  |  | 3 | .276602 |
| 4 | Enter the net value of noncharitable-use assets for 2019 from Part X, line 5 |  |  | 4 | 111,766,609. |
| 5 | Multiply line 4 by line 3 |  |  | 5 | 30,914,868. |
| 6 | 6 Enter 1\% of net investment income ( $1 \%$ of Part 1 , line 27b) |  |  | 6 | 79,250. |
| 7 | 7 Add lines 5 and 6 |  |  | 7 | 30,994,118. |
|  | Enter qualifying distributions from Part XII, line 4 |  |  | 8 | 39,613,040. |

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

1a Exempt operating foundations described in section 4940(d)(2), check here $\square$ and enter "N/A" on line 1. Date of ruling or determination letter: $\qquad$ (attach copy of letter if necessary-see instructions)
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1\% of Part I, line 27b
c All other domestic foundations enter 2\% of line 27b. Exempt foreign organizations, enter 4\% of Part l, line 12, col. (b)
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)
3 Add lines 1 and 2
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)
5 Tax based on investment income. Subtract line 4 from line 3 . If zero or less, enter -0-
6 Credits/Payments:
a 2019 estimated tax payments and 2018 overpayment credited to 2019
b Exempt foreign organizations - tax withheld at source
c Tax paid with application for extension of time to file (Form 8868)
d Backup withholding erroneously withheld
7 Total credits and payments. Add lines 6a through 6d

| 6a | $148,000$. |
| ---: | ---: |
| 6 b | 0. |
| 6 c | 0. |
| 6 d | 0. |

8 Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached
9 Tax due. If the total of lines 5 and 8 is more than line 7 , enter amount owed
10 Overpayment. If line 7 is more than the total of lines 5 and 8 , enter the amount overpaid
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax

## Part VII-A

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 If the answer is "Yes" to $\mathbf{1 a}$ or $\mathbf{1 b}$, 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?
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

$$
\text { (1) On the foundation. } \$ \ldots
$$

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ $\qquad$
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.
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
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?
N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction $T$.
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

- By language in the governing instrument, or
- By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV
8a Enter the states to which the foundation reports or with which it is registered. See instructions. MI
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
9 Is the foundation claiming status as a private operating foundation within the meaning of section $4942(\mathrm{j})(3)$ or $4942(\mathrm{j})(5)$ for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses


\section*{| Part VII-A | Statements Regarding Activities (continued) |
| :--- | :--- | :--- |}

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?

|  | Yes | No |
| :---: | :---: | :---: |
|  |  |  |
| 11 |  | X |
| 12 |  | X |
| 13 | X |  | Website address STRYKERJOHNSTONFOUNDATION.ORG

14 The books are in care of $\rightarrow$ WILLIAM D . JOHNSTON Telephone no. 269-388-9800 Located at 211 SOUTH ROSE STREET, KALAMAZOO, MI
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


16 At any time during calendar year 2019, 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

\section*{| Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required |
| :--- | :--- |}

## File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

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? $\quad \square$ Yes $\quad \mathrm{X}$ №
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .................................................................................................. $\square$ Yes X No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .................................... X Yes $\square$ No
(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)? $\square$ Yes X 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.) ...................................................... $\square$ Yes X 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 Organizations relying on a current notice regarding disaster assistance, check here

c Did the foundation engage in a prior year in any of the acts described in 1 a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?
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 2019, did the foundation have any undistributed income (Part XIII, lines
6 d and 6 e ) for tax year(s) beginning before 2019?
$\qquad$
$\qquad$ ,
If "Yes," list the years $\qquad$ , ,
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.)

42 (a)(2) are being applied to any of the years listed in 2a, list the years here.
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2 a , list the years here.
$\qquad$ , $\qquad$ , $\qquad$ ,
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 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) N/A
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 2019?

| 5a During the year, did the foundation pay or incur any amount to: |  |  | Yes | No |
| :---: | :---: | :---: | :---: | :---: |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? | Yes X No |  |  |  |
| (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? | Yes X No |  |  |  |
| (3) Provide a grant to an individual for travel, study, or other similar purposes? | Yes X No |  |  |  |
| (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions | Yes X No |  |  |  |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? | Yes X 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 | $N / A$ | 5b |  |  |
| Organizations relying on a current notice regarding disaster assistance, check here |  |  |  |  |
| c If the answer is "Yes" to question $5 \mathrm{a}(4)$, does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <br> If "Yes," attach the statement required by Regulations section 53.4945-5(d). | Yes $\square$ No |  |  |  |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | Yes X No |  |  |  |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? |  | 6b |  | X |
| If "Yes" to 6b, file Form 8870. |  |  |  |  |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? | Yes X No |  |  |  |
| b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? | N/A.. | 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(s) during the year? | Yes X No |  |  |  |

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

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


THE RONDA E. STRYKER AND
Form 990-PF (2019) WILLIAM D. JOHNSTON FOUNDATION

## Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)



\section*{| Part IX-A | Summary of Direct Charitable Activities |
| :--- | :--- |}



Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

| Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: Average monthly fair market value of securities |  | 1a | 112,943,955 |
| :---: | :---: | :---: | :---: |
| Average of monthly cash balances |  | b | 524,684. |
| c Fair market value of all other assets |  | 16 |  |
| d Total (add lines 1a, b, and c) |  | 1 d | 113,468,639. |
| e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) | 0. |  |  |
| Acquisition indebtedness applicable to line 1 assets |  | 2 | 0. |
| Subtract line 2 from line 1d |  | 3 | 113,468,639. |
| 4 Cash deemed held for charitable activities. Enter $11 / 2 \%$ of line 3 (for greater amount, see instructions) |  | 4 | 1,702,030. |
| Net value of noncharitable-use assets. Subtract line 4 from line 3 . Enter here and on Part V, line 4 |  | 5 | 111,766,609. |
| 6 Minimum investment return. Enter 5\% of line 5 |  | 6 | 5,588,330. |

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

| Minimum investment return from Part $X$, line 6 |  |  |  | 1 | 5,588,330. |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 2a | Tax on investment income for 2019 from Part VI, line 5 | 2a | 79,250. |  |  |
| b | Income tax for 2019. (This does not include the tax from Part VI.) | 2b |  |  |  |
| c | Add lines 2a and 2b |  |  | 2c | 79,250. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 |  |  | 3 | 5,509,080. |
| 4 | Recoveries of amounts treated as qualifying distributions |  |  | 4 | 0 - |
| 5 | Add lines 3 and 4 |  |  | 5 | 5,509,080. |
| 6 | Deduction from distributable amount (see instructions) |  |  | 6 | 0 - |
|  | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 |  |  | 7 | 5,509,080. |

## Part XII Qualifying Distributions (see instructions)

|  | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 | 1a | 39,613,040. |
| :---: | :---: | :---: | :---: |
|  | b Program-related investments - total from Part IX-B | 1b | 0 - |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 |  |
| a | Amounts set aside for specific charitable projects that satisfy the: Suitability test (prior IRS approval required) | 3a |  |
| b | b Cash distribution test (attach the required schedule) | 3b |  |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 | 4 | 39,613,040. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1\% of Part I, line 27b | 5 | 79,250. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 39,533,790. |

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

|  | (a) Corpus | (b) <br> Years prior to 2018 | $\begin{gathered} \hline \text { (c) } \\ 2018 \end{gathered}$ | $\begin{gathered} \text { (d) } \\ 2019 \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: |
| 1 Distributable amount for 2019 from Part XI, line 7 |  |  |  | 5,509,080. |
| 2 Undistributed income, if any, as of the end of 2019: <br> a Enter amount for 2018 only |  |  | 0 . |  |
| b Total for prior years: |  | 0. |  |  |
| 3 Excess distributions carryover, if any, to 2019: |  |  |  |  |
| $\text { a From } 2014 \quad \ldots \ldots \ldots$ |  |  |  |  |
| bFrom 2015 ................ $112,501$. |  |  |  |  |
| c From 2016 |  |  |  |  |
| dFrom 2017 ........ $13,652,259$. |  |  |  |  |
| eFrom 2018 ......... $30,333,735$. |  |  |  |  |
| $f$ Total of lines 3a through e | 47,441,078. |  |  |  |
| 4 Qualifying distributions for 2019 from <br> Part XII, line 4: \$ 39, 613, 040 . |  |  |  |  |
| a Applied to 2018, but not more than line 2a |  |  | 0 . |  |
| bApplied to undistributed income of prior years (Election required - see instructions) |  | 0. |  |  |
| c Treated as distributions out of corpus (Election required - see instructions) | 0. |  |  |  |
| dApplied to 2019 distributable amount |  |  |  | 5,509,080. |
| e Remaining amount distributed out of corpus | 34,103,960. |  |  |  |
| 5 Excess distributions carryover applied to 2019 (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 $3 \mathrm{f}, 4 \mathrm{c}$, and 4 e . Subtract line 5 | 81,545,038. |  |  |  |
| bPrior years' undistributed income. Subtract line 4 b from line 2 b |  | 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. |  |  |
| dSubtract line 6c from line 6b. Taxable amount - see instructions |  | 0. |  |  |
| e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr. |  |  | 0 . |  |
| f Undistributed income for 2019. Subtract lines $4 d$ and 5 from line 1. This amount must be distributed in 2020 |  |  |  | 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 2014 not applied on line 5 or line 7 | 2,342,583. |  |  |  |
| 9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a | 79,202,455. |  |  |  |
| 10 Analysis of line 9: |  |  |  |  |
| a Excess from 2015... $\begin{aligned} & 1,112,501 .\end{aligned}$ |  |  |  |  |
| b Excess from 2016 |  |  |  |  |
| c Excess from 2017 ... $13,652,259$. |  |  |  |  |
| dExcess from 2018... $30,333,735$. |  |  |  |  |
| e Excess from 2019... 3 3,103,960. |  |  |  |  |


| Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) <br> 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling <br> b Check box to indicate whether the foundation is a private operating foundation described in section |  |  |  | N/A |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| 2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed <br> b $85 \%$ of line 2 a <br> c Qualifying distributions from Part XII, line 4 , for each year listed $\qquad$ <br> d Amounts included in line 2c not used directly for active conduct of exempt activities $\qquad$ <br> e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2 c $\qquad$ <br> 3 Complete 3a, b, or c for the alternative test relied upon: <br> a "Assets" alternative test - enter: <br> (1) Value of all assets $\qquad$ <br> (2) Value of assets qualifying under section 4942(j)(3)(B)(i) <br> b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed <br> c "Support" alternative test - enter: <br> (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) <br> (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) <br> (3) Largest amount of support from an exempt organization $\qquad$ <br> (4) Gross investment income | Tax year | Prior 3 years |  |  | (e) Total |
|  | (a)2019 | (b) 2018 | (c) 2017 | (d) 2016 |  |
|  |  |  |  |  |  |
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## Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)

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

## SEE STATEMENT <br> 12

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.

## NONE

```
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
\(\square\) Check here the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items \(2 \mathrm{a}, \mathrm{b}, \mathrm{c}\), and d .
```

a The name, address, and telephone number or email address of the person to whom applications should be addressed:
MEGAN M. JOHNSTON, (269)388-9800
211 SOUTH ROSE STREET, KALAMAZOO, MI 49007
b The form in which applications should be submitted and information and materials they should include:
GRANT APPLICATION AND REQUIREMENTS ARE AVAILABLE ON OUR WEBSITE.
c Any submission deadlines:
GRANT SUBMISSION DEADLINES ARE POSTED ON OUR WEBSITE.
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
RESTRICTIONS AND LIMITATIONS ON GRANT ELIGIBILITY IS OUTLINED ON OUR WEBSITE.

| Part XV | Supplementary Information (continued) |
| :--- | :--- |

3 Grants and Contributions Paid During the Year or Approved for Future Payment


| Enter gross amounts unless otherwise indicated. | Unrelated business income |  | Excluded by section 512, 513, or 514 |  | (e)Related or exemptfunction income |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | $\begin{gathered} \text { (a) } \\ \text { Business } \\ \text { code } \end{gathered}$ | (b) <br> Amount | (C) <br> ExClu- <br> sion <br> 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 |  |  |  |  |  |
| 4 Dividends and interest from securities. |  |  | 14 | 1,260,723. |  |
| 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 | 3,739,252. |  |
| 9 Net income or (loss) from special events |  |  |  |  |  |
| 10 Gross profit or (loss) from sales of inventory |  |  |  |  |  |
| 11 Other revenue: <br> a |  |  |  |  |  |
| b |  |  |  |  |  |
| c |  |  |  |  |  |
| d |  |  |  |  |  |
| e |  |  |  |  |  |
| 12 Subtotal. Add columns (b), (d), and (e) |  | 0 . |  | 4,999,975. | 0 - |
| 13 Total. Add line 12, columns (b), (d), and (e) |  |  |  | ....... 13 | 4,999,975. |

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

| Line No. <br> $\nabla$ | Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of <br> the foundation's exempt purposes (other than by providing funds for such purposes). |
| :--- | :--- |
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## Part XVII <br> Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501 (c)(3) organizations) or in section 527 , relating to political organizations?
a Transfers from the reporting foundation to a noncharitable exempt organization of:
(1) Cash
(2) Other assets
b Other transactions:
(1) Sales of assets to a noncharitable exempt organization
(2) Purchases of assets from a noncharitable exempt organization
(3) Rental of facilities, equipment, or other assets
(4) Reimbursement arrangements
(5) Loans or loan guarantees
(6) Performance of services or membership or fundraising solicitations
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

|  | Yes | No |
| :---: | :---: | :---: |
|  |  |  |
| 1a(1) |  | X |
| 1a(2) |  | X |
|  |  |  |
| 1b(1) |  | X |
| 1b(2) |  | X |
| 1b(3) |  | X |
| 1b(4) |  | X |
| 1b(5) |  | X |
| 1b(6) |  | X |
| 1 c |  | X |

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 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | N/A |  |  |  |  |
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| 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described <br> in section 501(c) (other than section 501(c)(3)) or in section 527 ? $\square$ Yes <br> b If "Yes," complete the following schedule. |  |  |  |  |  |  |  |
| (a) Name of organization |  |  |  | (b) Type of organization | (c) Description of relationship |  |  |
| N/A |  |  |  |  |  |  |  |
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| Sign Here |  |  |  |  |  |  |  |
| Paid |  |  |  |  |  | Check $\square$ if self- employed | PTIN P00124073 |
| Prepa | arer | Firm's name JAMES \& SPRINGGATE PLC |  |  |  | Firm's EIN *** ***3032 |  |
| Use Only |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Firm's address 490 WEST SOUTH STREET |  |  |  | Phone no. 269-384-0219 |  |

Form 990-PF (2019)

| Part XV ${ }^{\text {P }}$ Supplementary Information |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 3 Grants and Contributions Paid During the Year (Continuation) |  |  |  |  |
| 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) |  |  |  |  |
| CITY OF KALAMAZOO 241 WEST SOUTH STREET KALAMAZOO, MI 49007 | NONE | GOVERNMENT U | OBJECTIVES OF IMAGINE <br> KALAMAZOO 2025 | 26,476,323. |
| COMMUNITY HEALING CENTERS 2615 STADIUM DRIVE KALAMAZOO, MI 49008 | NONE | PUBLIC | NINAS DEL CORAZON, GIRLS OF THE HEART PROGRAM | 45,000. |
| COMMUNITY HOMEWORKS 810 BRYANT STREET KALAMAZOO, MI 49001 | NONE | PUBLIC | AFFORDABLE <br> SUSTAINABILITY FOR <br> LOW-INCOME HOMEOWNERS | 75,000. |
| ECUMENICAL SENIOR CENTER <br> 702 N BURDICK ST <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | ESC mini bus | 65,000. |
| EDISON NEIGHBORHOOD ASSOCIATION 816 WASHINGTON AVE KALAMAZOO, MI 49001 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 10,000. |
| ERACCE <br> 810 RANKIN AVE <br> KALAMAZOO, MI 49006 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 80,000. |
| FAIR HOUSING CENTER OF SOUTHWEST MICHIGAN <br> 405 W michigan ave suite 6 <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | GENERAL SUPPORT | 50,000. |
| FIRE HISTORICAL \& CULTURAL ARTS COLLABORATIVE <br> 1249 PORTAGE STREET <br> KALAMAZOO, MI 49001 | NONE | PUBLIC | YOUTH-OWNED SPACE: AN ARTS \& JUSTICE HUB FOR feens | 300,000. |
| FIRST CONGREGATIONAL CHURCH OF KALAMAZOO <br> 345 W MICHIGAN AVE <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | THE OBJECTIVES OF KALAMAZOO DROP-IN CHILD CARE CENTER | 20,000. |
| FIRST UNITED METHODIST CHURCH OF <br> KALAMAZOO <br> 212 S PARK ST <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | JUSTICE FOR OUR NEIGHBORS (JFON) SERVICE EXPANSION | 30,000. |
| Total from continuation sheets |  |  |  | 38,695,386. |


| Part XV ${ }^{\text {P }}$ Supplementary Information |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 3 Grants and Contributions Paid During the Year (Continuation) |  |  |  |  |
| 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) |  |  |  |  |
| GFM the synergy center 625 HARRISON ST KALAMAZOO, MI 49007 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 200,000. |
| GOODWILL INDUSTRIES OF SOUTHWESTERN michigan <br> 420 E. ALCOTT ST <br> KALAMAZOO, MI 49001 | NONE | PUBLIC | LIFE GUIDES PROGRAM | 653,319. |
| GUARDIAN FINANCE \& ADVOCACY SERVICES 18 WEST MICHIGAN AVE SUITE 300 BATTLLE CREEK, MI 49017 | NONE | PUBLIC | IMPROVE COMMUNITY'S UPWARD MOBILITY \& INCREASED FINANCIAL SOPHISTICATION \& RESPONSIBILITY | 100,000. |
| GULL LAKE COMMUNITY SCHOOLS <br> FOUNDATION <br> 10100 E D AVE <br> RICHLAND, MI 49083 | NONE | PUBLIC | GULL LAKE GATEWAY ACADEMY | 15,000. |
| HEALTHY HOUSE 1835 NICHOLS ROAD KALAMAZOO, MI 49006 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 17,039. |
| HISPANIC AMERICAN COUNCIL, INC. <br> 930 LAKE ST \#A <br> KALAMAZOO, MI 49001 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 150,000. |
| INNER CITY YOUTH FOR CHANGE <br> PO BOX 19223 <br> KALAMAZOO, MI 49019 | NONE | Public | GENERAL OPERATING SUPPORT | 35,000. |
| INTERACT OF MICHIGAN 610 S BURDICK ST KALAMAZOO, MI 49007 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 60,000. |
| KALAMAZOO COLLECTIVE HOUSING 315 W MICHIGAN AVE <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | AFFORDABLE HOUSING <br> COOPERATIVE PROPERTY <br> PURCHASE | 113,275. |
| KALAMAZOO COMMUNITY FOUNDATION 402 E MICHIGAN AVE KALAMAZOO, MI 49007 | NONE | PUBLIC | EQUITY IN EARLY CHILDHOOD WITHIN THE BEST BABY ZONE | 207,486. |
| Total from continuation sheets |  |  |  |  |


| Part XV | Supplementary Information |
| :--- | :--- |


| 3 Grants and Contributions Paid During the | (Continuation) |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 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) |  |  |  |  |
| KALAMAZOO COMMUNITY FOUNDATION <br> 402 E MICHIGAN AVE <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | TRUTH, RACIAL HEALING, <br> AND TRANSFORMATION <br> KALAMAZOO | 251,828. |
| KALAMAZOO COUNTY READY 4S 259 E MICHIGAN AVE \#209 KALAMAZOO, MI 49007 | NONE | PUBLIC | GENERAL SUPPORT FOR <br> TWO-TIERED <br> GENERATIONAL POVERTY <br> INITIATIVE | 600,000. |
| KALAMAZOO INSTITUTE OF ARTS 314 S PARK ST <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | KALAMAZOO INSTITUTE OF ARTS BLACK REFRACTIONS PROGRAM | 85,000. |
| KALAMAZOO LITERACY COUNCIL <br> 420 E. ALCOTT ST SUITE 400 <br> KALAMAZOO, MI 49001 | NONE | PUBLIC | EXPRESS WAYS 2 SUCCESS | 100,000. |
| KALAMAZOO PUBLIC LIBRARY <br> 315 S ROSE ST <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | REFUND OF 2018 <br> GRANT-READING TOGETHER <br> 2019-AUTHOR VISIT <br> ANGIE THOMAS | -5,000. |
| KALAMAZOO REGIONAL EDUCATIONAL SERVICE AGENCY <br> 1819 EAST MILHAM AVE. <br> PORTAGE, MI 49002 | NONE | GOVERNMENT | SEEDS FOR SUCCESS | 200,000. |
| KALAMAZOO SYMPHONY ORCHESTRA <br> 359 S KALAMAZOO MALL \#100 <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | KSO PARTNERSHIPS FOR <br> INCLUSION \& EQUITY | 120,843. |
| KALAMAZOO VALLEY COMMUNITY COLLEGE FOUNDATION <br> 6767 WEST O AVENUE <br> KALAMAZOO, MI 49003 | NONE | PUBLIC | HEALTHY LIVING CAMPUS | 1,011,686. |
| KALAMAZOO VALLEY COMMUNITY COLLEGE FOUNDATION <br> 6767 WEST O AVENUE <br> KALAMAZOO, MI 49009 | NONE | PUBLIC | KALAMAZOO VALLEY ACCELERATED ASSOCIATE PROGRAM | 321,800. |
| KALAMAZOO VALLEY HABITAT FOR HUMANITY <br> 1126 GULL RD <br> KALAMAZOO, MI 49048 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 50,000. |
| Total from continuation sheets .................. |  | $\ldots$ | .................................... |  |


| Part XV | Supplementary Information |
| :--- | :--- |


| 3 Grants and Contributions Paid During the | (Continuation) |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 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) |  |  |  |  |
| KALAMAZOO YOUTH DEVELOPMENT NETWORK <br> 912 N BURDICK STREET <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | GETTING YOUTH READY BY 21 | 148,400. |
| KIDS MOVING \& THRIVING <br> 120 ROBERSON STREET <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | KIDS MOVING \& THRIVING PROGRAM | 15,000. |
| MERZE TATE EXPLORERS <br> 310 E. MICHIGAN AVE BOX 51042 <br> KALAMAZOO, MI 49005 | NONE | PUBLIC | MERZE TATE EXPLORERS COLLEGE \& CAREER ACADEMY | 70,000. |
| MINISTRY WITH COMMUNITY 500 N. EDWARDS ST KALAMAZOO, MI 49007 | NONE | PUBLIC | PATHWAYS TO SUCCESS PROJECT | 276,667. |
| OPEN DOORS KALAMAZOO <br> 1141 S. ROSE STREET, SUITE B KALAMAZOO, MI 49001 | NONE | PUBLIC | HOUSING AND SHELTER PROGRAMS | 30,000. |
| OPEN ROADS BIKE PROGRAM 1523 RIVERVIEW DR SUITE B KALAMAZOO, MI 49004 | NONE | PUBLIC | SUSTAINABLE IMPACT THROUGH OPEN ROADS BIKE PROGRAM | 9,000. |
| OUTFRONT KALAMAZOO <br> 340 S ROSE ST <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | THE LGBTQ COMMUNITY SURVIVING, LIVING, THRIVING | 100,000. |
| PORTAGE COMMUNITY OUTREACH CENTER <br> 325 E CENTRE AVE <br> PORTAGE, MI 49002 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 25,000. |
| PREVENTION WORKS <br> 611 WHITCOMB SUITE A <br> KALAMAZOO, MI 49008 | NONE | PUBLIC | BETTER TOOLS BRIGHTER <br> FUTURES ADVANCEMENT <br> CAMPAIGN | 497,128. |
| PREVENTION WORKS <br> 611 WHITCOMB SUITE A <br> KALAMAZOO, MI 49008 | NONE | PUBLIC | HUB ONE | 2,766,141. |
| Total from continuation sheets | ................................ | ................ | ......................... |  |



| Part XV | Supplementary Information |
| :--- | :--- |



| Part XV ${ }^{\text {P }}$ Supplementary Information |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 3 Grants and Contributions Approved for Future Payment (Continuation) |  |  |  |  |
| 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) |  |  |  |  |
| KALAMAZOO LOAVES \& FISHES 901 PORTAGE STREET KALAMAZOO, MI 49001 | NONE | PUBLIC | GROCERY PANTRY PROGRAM | 120,000. |
| KALAMAZOO NEIGHBORHOOD HOUSING SERVICES, INC. <br> 1219 S. PARK STREET <br> KALAMAZOO, MI 49001 | NONE | PUBLIC | LEAD PAINT HAZARD CONTROL/HOMEOWNERSHIP CENTER | 100,000. |
| KALAMAZOO REGIONAL EDUCATIONAL SERVICE AGENCY <br> 1819 EAST MILHAM AVE. <br> PORTAGE, MI 49002 | NONE | GOVERNMENT | SEEDS FOR SUCCESS | 800,000. |
| KALAMAZOO VALLEY COMMUNITY COLLEGE FOUNDATION <br> 6767 WEST O AVENUE <br> KALAMAZOO, MI 49009 | NONE | PUBLIC | KALAMAZOO VALLEY ACCELERATED ASSOCIATE PROGRAM | 1,278,200. |
| KALAMAZOO YOUTH DEVELOPMENT NETWORK 912 N BURDICK STREET <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | GETtING READY BY 21 | 445,200. |
| MINISTRY WITH COMMUNITY 500 N. EDWARDS ST KALAMAZOO, MI 49007 | NONE | PUBLIC | PATHWAYS TO SUCCESS | 553,334. |
| PREVENTION WORKS 611 Whitcomb Suite A KALAMAZOO, MI 49008 | NONE | PUBLIC | HUB ONE | 5,825,651. |
| ST. LUKE'S EPISCOPAL CHURCH 247 W. LOVELL STREET KALAMAZOO, MI 49007 | NONE | PUBLIC | TO ADDRESS UNMET PIAPERING NEEDS IN THE COMMUNITY | 75,000. |
| ST. LUKE'S EPISCOPAL CHURCH 247 W. LOVELL STREET KALAMAZOO, MI 49007 | NONE | PUBLIC | TO ADDRESS UNMET HOME FURNISHING NEEDS IN THE COMMUNITY | 30,000. |
| URBAN ALLIANCE <br> 1009 E. STOCKBRIDGE AVE, STE 100 KALAMAZOO, MI 49001 | NONE | PUBLIC | GENERAL OPERATING SUPPORT | 2,200,000. |
| Total from continuation sheets |  |  |  |  |

THE RONDA E. STRYKER AND
WILLIAM D. JOHNSTON FOUNDATION
**_***4966

| Part XV | Supplementary Information |
| :--- | :--- |


| 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) |  |  |  |  |
| VIBRANT KALAMAZOO <br> 1523 RIVERVIEW DR SUITE A KALAMAZOO, MI 49004 | NONE | PUBLIC | EASTSIDE SQUARE: EAST <br> MAIN COMMERCIAL <br> CORRIDOR (1600 BLOCK) <br> REDEVELOPMENT | 333,334. |
| YOUNG WOMEN'S CHRISTIAN ASSOCIATION OF KALAMAZOO <br> 353 E MICHIGAN AVE <br> KALAMAZOO, MI 49007 | NONE | PUBLIC | general operating and <br> CAPACITY BUILDING | 1,500,000. |
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| Total from continuation sheets |  |  |  |  |

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - SOCIETY FOR HISTORY AND RACIAL EQUITY
RACIAL HEALING INITIATIVE UNDERSTANDING RACE-HOW WE GOT WHERE WE ARE
HISTORY WORKSHOP SERIES
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3b Grants and Contributions Approved for Future Payment Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - KALAMAZOO CENTER FOR YOUTH \& COMMUNITY
IGNITING GREATNESS, EASTSIDE YOUTH ACADEMIC SUCCESS, RACIAL EQUITY AND

SOCIAL EMOTIONAL SKILLBUILDING
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$\qquad$ Underpayment of Estimated Tax by Corporations FORM 990-PF
Internal Revenue Service
Attach to the corporation's tax return.
Go to www.irs.gov/Form2220 for instructions and the latest information.
Name THE RONDA E. STRYKER AND
Employer identification number
WILLIAM D. JOHNSTON FOUNDATION
** - * * * 4966
Note: Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2 , line 38 , on the estimated tax penalty line of the corporation's income tax return, but do not attach Form 2220.

\section*{| Part I | Required Annual Payment |
| :--- | :--- |}


| 1 Total tax (see instructions) |  |  |  | 79,250. |
| :---: | :---: | :---: | :---: | :---: |
| 2a Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1 b Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section $167(\mathrm{~g})$ for depreciation under the income forecast method |  |  |  |  |
|  |  |  |  |  |
| c Credit for federal tax paid on fuels (see instructions) $\qquad$ 2c <br> d Total. Add lines 2a through 2c |  |  |  |  |
|  |  |  |  |  |
| 3 Subtract line 2 d from line 1 . If the result is less than $\$ 500$, do not complete or file this form. The corporation does not owe the penalty |  |  |  | 79,250. |
| 4 Enter the tax shown on the corporation's 2018 income tax return. See instructions. Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5 |  |  |  | 72,443. |
| 5 Required annual payment. Enter the smaller of line 3 or line 4 . If the corporation is required to skip line 4, enter the amount from line 3 |  |  |  | 72,443. |

Part II Reasons for Filing - Check the boxes below that apply. If any boxes are checked, the corporation must file Form 2220
even if it does not owe a penalty. See instructions.
$6 \quad \square$ The corporation is using the adjusted seasonal installment method.
7 X The corporation is using the annualized income installment method.
8 X The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

| Part III | Figuring the Underpayment |
| :--- | :--- |

9 Installment due dates. Enter in columns (a) through (d) the 15 th day of the 4 th (Form 990-PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year
10 Required installments. If the box on line 6 and/or line 7 above is checked, enter the amounts from $\operatorname{Sch} \mathrm{A}$, line 38 . If the box on line 8 (but not 6 or 7 ) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter $25 \%(0.25)$ of line 5 above in each column
11 Estimated tax paid or credited for each period. For column (a) only, enter the amount from line 11 on line 15. See instructions
Complete lines 12 through 18 of one column before going to the next column.
12 Enter amount, if any, from line 18 of the preceding column
13 Add lines 11 and 12
14 Add amounts on lines 16 and 17 of the preceding column
15 Subtract line 14 from line 13 . If zero or less, enter -0 -
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-

17 Underpayment. If line 15 is less than or equal to line 10 , subtract line 15 from line 10 . Then go to line 12 of the next column. Otherwise, go to line 18
18 Overpayment. If line 10 is less than line 15 , subtract line 10 from line 15. Then go to line 12 of the next column

|  | (a) | (b) | (c) | (d) |
| :---: | :---: | :---: | :---: | :---: |
| 9 | 05/15/19 | 06/15/19 | 09/15/19 | 12/15/19 |
| 10 | 4,334. | 840. | 43,662. | 25,046. |
| 11 | 9,000. | 1,500. | 87,500. | 50,000. |
| 12 |  | 4,666. | 5,326. | 49,164. |
| 13 |  | 6,166. | 92,826. | 99,164. |
| 14 |  |  |  |  |
| 15 | 9,000. | 6,166. | 92,826. | 99,164. |
| 16 |  | 0. | 0. |  |
| 17 |  |  |  |  |
| 18 | 4,666. | 5,326. | 49,164. |  |

## Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 - no penalty is owed.

LHA For Paperwork Reduction Act Notice, see separate instructions.
Form 2220 (2019)

## Part IV Figuring the Penalty

|  |  |  | (a) | (b) |  | (c) |  |  | (d) |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 19 Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. (C corporations with tax years ending June 30 and S corporations: Use 3rd month instead of 4th month. Form 990-PF and Form 990-T filers: Use 5th month instead of 4th month.) See instructions |  |  |  |  |  |  |  |  |  |  |
| 20 Number of days from due date of installment on line 9 to the date shown on line 19 |  |  |  |  |  |  |  |  |  |  |
| 21 Number of days on line 20 after 4/15/2019 and before 7/1/2019 ...... 21 |  |  |  |  |  |  |  |  |  |  |
| 2 | Underpayment on line $17 \times$ Number of days on line $21 \times 6 \%(0.06)$ | 22 | \$ | \$ | \$ |  |  | \$ |  |  |
| 2 | Number of days on line 20 after 06/30/2019 and before 10/1/2019 | 23 |  |  |  |  |  |  |  |  |
| 2 | Underpayment on line $17 \times$ Number of days on line $23 \times 5 \%(0.05)$ | 24 | \$ | \$ | \$ |  |  | \$ |  |  |
| 2 | Number of days on line 20 after 9/30/2019 and before 1/1/2020 | 25 |  |  |  |  |  |  |  |  |
| 26 | Underpayment on line $17 \times \underline{\text { Number of days on line } 25 \times 5 \%(0.05)}$ | 26 | \$ | \$ | \$ |  |  | \$ |  |  |
| 27 | Number of days on line 20 after 12/31/2019 and before 4/1/2020 | 27 |  |  |  |  |  |  |  |  |
| 28 | Underpayment on line $17 \times$ Number of days on line $27 \times 5 \%(0.05)$ | 28 | \$ | \$ | \$ |  |  | \$ |  |  |
| 29 | Number of days on line 20 after 3/31/2020 and before 7/1/2020 | 29 |  |  |  |  |  |  |  |  |
| 30 | Underpayment on line $17 \times$ Number of days on line $29 \times \%$ | 30 | \$ | \$ | \$ |  |  | \$ |  |  |
| 31 | Number of days on line 20 after 6/30/2020 and before 10/1/2020 | 31 |  |  |  |  |  |  |  |  |
| 32 | Underpayment on line $17 \times$ Number of days on line $31 \times \%$ | 32 | \$ | \$ | \$ |  |  | \$ |  |  |
| 33 | Number of days on line 20 after 9/30/2020 and before $1 / 1 / 2021$ | 33 |  |  |  |  |  |  |  |  |
| 34 | Underpayment on line $17 \times$ Number of days on line $33 \times \%$ | 34 | \$ | \$ | \$ |  |  | \$ |  |  |
| 35 | Number of days on line 20 after 12/31/2020 and before 3/16/2021 | 35 |  |  |  |  |  |  |  |  |
| 36 | Underpayment on line $17 \times$ Number of days on line $35 \times \%$ | 36 | \$ | \$ | \$ |  |  | \$ |  |  |
| 37 | Add lines 22, 24, 26, 28, 30, 32,34 , and 36 | 37 | \$ | \$ | \$ |  |  | \$ |  |  |
| 38 | Penalty. Add columns (a) through (d) of line 37 . Enter the line for other income tax returns | al he | ere and on Form | e 34; or the co |  |  | 38 | \$ |  | 0 . |

* Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter.

These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at www.irs.gov. You can also call 1-800-829-4933 to get interest rate information.

Form 2220 (2019)

THE RONDA E. STRYKER AND WILLIAM D. JOHNSTON FOUNDATION

## Schedule A Adjusted Seasonal Installment Method and Annualized Income Installment Method

See instructions.
Form 1120-S filers: For lines 1, 2, 3, and 21, "taxable income" refers to excess net passive income or the amount on which tax is imposed under section 1374(a), whichever applies.

## Part I Adjusted Seasonal Installment Method

Caution: Use this method only if the base period percentage for any 6 consecutive months is at least $70 \%$. See instructions.

1 Enter taxable income for the following periods.
a Tax year beginning in 2016
bTax year beginning in 2017
c Tax year beginning in 2018
2 Enter taxable income for each period for the tax year beginning in 2019. See the instructions for the treatment of extraordinary items

3 Enter taxable income for the following periods.
a Tax year beginning in 2016
bTax year beginning in 2017
c Tax year beginning in 2018
4 Divide the amount in each column on line 1a by the amount in column (d) on line 3a
5 Divide the amount in each column on line 1b by the amount in column (d) on line 3b
6 Divide the amount in each column on line 1c by the amount in column (d) on line 3c

7 Add lines 4 through 6
8 Divide line 7 by 3.0
9 a Divide line 2 by line 8
bExtraordinary items (see instructions)
c Add lines 9a and 9b
10 Figure the tax on the amt on In 9 c using the instr for Form 1120, Sch J, line 2, or comparable line of corp's return
11a Divide the amount in columns (a) through (c) on line 3a by the amount in column (d) on line 3a
bDivide the amount in columns (a) through (c) on line 3b by the amount in column (d) on line 3b
c Divide the amount in columns (a) through (c) on line 3c by the amount in column (d) on line 3c
12 Add lines 11a through 11c
13 Divide line 12 by 3.0
14 Multiply the amount in columns (a) through (c) of line 10 by columns (a) through (c) of line 13 . In column (d), enter the amount from line 10, column (d)
15 Enter any alternative minimum tax (trusts only) for each payment period. See instructions

16 Enter any other taxes for each payment period. See instr.
17 Add lines 14 through 16
18 For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions
19 Total tax after credits. Subtract line 18 from line 17. If zero or less, enter -0-

| 1a | (a) | (b) | (c) | (d) |
| :---: | :---: | :---: | :---: | :---: |
|  | First 3 months | First 5 months | First 8 months | First 11 months |
|  |  |  |  |  |
| 1 b |  |  |  |  |
| 1 c |  |  |  |  |
| 2 |  |  |  |  |
| 3a | First 4 months | First 6 months | First 9 months | Entire year |
|  |  |  |  |  |
| 3b |  |  |  |  |
| 3c |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |
| 8 |  |  |  |  |
| 9a |  |  |  |  |
| 9b |  |  |  |  |
| 9c |  |  |  |  |
| 10 |  |  |  |  |
| 11a |  |  |  |  |
| 11b |  |  |  |  |
| 11c |  |  |  |  |
| 12 |  |  |  |  |
| 13 |  |  |  |  |
| 14 |  |  |  |  |
| 15 |  |  |  |  |
| 16 |  |  |  |  |
| 17 |  |  |  |  |
| 18 |  |  |  |  |
| 19 |  |  |  |  |

Part II Annualized Income Installment Method

| 20 Annualization periods (see instructions) <br> 21 Enter taxable income for each annualization period. See instructions for the treatment of extraordinary items |  | (a) | (b) | (c) | (d) |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | 20 | $\begin{gathered} \hline \text { First } \frac{2}{\text { months }} \\ \hline \end{gathered}$ | $\begin{gathered} \text { First } \frac{3}{\text { months }} \\ \hline \end{gathered}$ | $\begin{gathered} \text { First } \frac{6}{\text { months }} \\ \hline \end{gathered}$ | $\begin{gathered} \hline \text { First } \quad 9 \\ \text { months } \end{gathered}$ |
|  | 21 | 288,937. | 258,669. | 3,255,766. | 5,541,153. |
| 22 Annualization amounts (see instructions) | 22 | 6.000000 | 4.000000 | 2.000000 | 1.333330 |
| 23a Annualized taxable income. Multiply line 21 by line 22 b Extraordinary items (see instructions) <br> c Add lines 23a and 23b | 23a | 1,733,622. | 1,034,676. | 6,511,532. | 7,388,186. |
|  | 23b |  |  |  |  |
|  | 23c | 1,733,622. | 1,034,676. | 6,511,532. | 7,388,186. |
| 24 Figure the tax on the amount on line 23c using the instructions for Form 1120, Schedule J, line 2, or comparable line of corporation's return <br> 25 Enter any alternative minimum tax (trusts only) for each payment period (see instructions) | 24 | 17,336. | 10,347. | 65,115. | 73,882. |
|  | 25 |  |  |  |  |
| 26 Enter any other taxes for each payment period. See instr. | 26 |  |  |  |  |
| 27 Total tax. Add lines 24 through 26 <br> 28 For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions | 27 | 17,336. | 10,347. | 65,115. | 73,882. |
|  | 28 |  |  |  |  |
| 29 Total tax after credits. Subtract line 28 fr zero or less, enter -0- | 29 | 17,336. | 10,347. | 65,115. | 73,882. |
| 30 Applicable percentage | 30 | 25\% | 50\% | 75\% | 100\% |
| 31 Multiply line 29 by line 30 | 31 | 4,334. | 5,174. | 48,836. | 73,882. |

Part III Required Installments

| Note: Complete lines 32 through 38 of one column before completing the next column. |  | $\begin{gathered} \hline \text { 1st } \\ \text { installment } \end{gathered}$ | $\begin{gathered} \text { 2nd } \\ \text { installment } \end{gathered}$ | $\begin{gathered} \text { 3rd } \\ \text { installment } \end{gathered}$ | $\begin{gathered} \hline \text { 4th } \\ \text { installment } \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: |
| column from line 19 or line 31 | 32 | 4,334. | 5,174. | 48,836. | 73,882. |
| 33 Add the amounts in all preceding columns of line 38. See instructions | 33 |  | 4,334. | 5,174. | 48,836. |
| 34 Adjusted seasonal or annualized income installments. Subtract line 33 from line 32 . If zero or less, enter - 0 - | 34 | 4,334. | 840. | 43,662. | 25,046. |
| 35 Enter 25\% ( 0.25 ) of line 5 on page 1 of Form 2220 in each column. Note: "Large corporations," see the instructions for line 10 for the amounts to enter | 35 | 18,111. | 21,514. | 19,813. | 19,812. |
| 36 Subtract line 38 of the preceding column from line 37 of the preceding column | 36 |  | 13,777. | 34,451. | 10,602. |
| 37 Add lines 35 and 36 | 37 | 18,111. | 35,291. | 54,264. | 30,414. |
| 38 Required installments. Enter the smaller of line 34 or line 37 here and on page 1 of Form 2220 , line 10. See instructions | 38 | 4,334. | 840. | 43,662. | 25,046. |
| ** ANNUALIZED INCOM |  | LLMENT | OD USI | FANDARD | Form 2220 (2019) ION |


| FORM 990-PF | DIVIDENDS |
| :--- | :--- | :--- | :--- | :--- |


| DESCRIPTION | (A) <br> EXPENSES <br> PER BOOKS | (B) <br> NET INVEST MENT INCOME | (C) <br> ADJUSTED NET INCOME | (D) <br> CHARITABLE <br> PURPOSES |
| :---: | :---: | :---: | :---: | :---: |
| ATTORNEY FEES | 50,231. | 0. | 0 . | 50,231. |
| TO FM 990-PF, PG 1, LN 16A | 50,231. | 0. | 0. | 50,231. |
| FORM 990-PF | ACCOUNTI | VG FEES |  | TEMENT |


| DESCRIPTION | (A) <br> EXPENSES <br> PER BOOKS | (B) <br> NET INVESTMENT INCOME | (C) <br> ADJUSTED NET INCOME | $\begin{gathered} \text { (D) } \\ \text { CHARITABLE } \\ \text { PURPOSES } \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: |
| TAX RETURN PREPARATION | 3,845. | 1,923. | 0. | 1,922. |
| TO FORM 990-PF, PG 1, LN 16B | 3,845. | 1,923. | 0. | 1,922. |


| FORM 990-PF | OTHER PROFESSIONAL FEES |  | STATEMENT |
| :--- | :---: | :---: | :---: | :---: | :---: |



| DESCRIPTION | (A) <br> EXPENSES PER BOOKS | (B) <br> NET INVESTMENT INCOME | (C) <br> ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| :---: | :---: | :---: | :---: | :---: |
| TECHNOLOGY | 10,149. | 0. | 0. | 10,149. |
| DUES AND MEMBERSHIPS | 33,879. | 0. | 0. | 33,879. |
| BANK FEES | 27. | 0 . | 0 . | 27. |
| MISCELLANEOUS | 543. | 0. | 0 . | 543. |
| OFFICE SUPPLIES | 1,079. | 0 . | 0 . | 1,079. |
| POSTAGE | 9. | 0. | 0 . | 9 |
| FEES \& LICENSES | 20. | 0 . | 0 . | 20 |
| INTEREST CHARGES | 823. | 0 . | 0. | 0. |
| TO FORM 990-PF, PG 1, LN 23 | 46,529. | 0 . | 0. | 45,706. |



| DESCRIPTION | U.S. | $\begin{aligned} & \text { OTHER } \\ & \text { GOV'T } \end{aligned}$ | BOOK VALUE | FAIR MARKET VALUE |
| :---: | :---: | :---: | :---: | :---: |
| MICHIGAN ST. HSG DEV AUTH REN |  | X | 1,000,000. | 997,030. |
| TOTAL U.S. GOVERNMENT OBLIGATIONS |  |  |  |  |
| TOTAL STATE AND MUNICIPAL GOVERNMENT | OBLIG | ATIONS | 1,000,000. | 997,030. |
| TOTAL TO FORM 990-PF, PART II, LINE | 10A |  | 1,000,000. | 997,030. |




NAME OF MANAGER
RONDA E. STRYKER
WILLIAM D. JOHNSTON


Depreciation and Amortization
(Including Information on Listed Property) 990 -PF

- Attach to your tax return.

Department of the Treasury Internal Revenue Service
(99)

Name(s) shown on return
-

Go to www.irs.gov/Form4562 for instructions and the latest information.
THE RONDA E. STRYKER AND
WILLIAM D. JOHNSTON FOUNDATION
Business or activity to which this form relates


## Note: Don't use Part II or Part III below for listed property. Instead, use Part V.

\section*{| Part II | Special Depreciation Allowance and Other Depreciation (Don't include listed property.) |
| :--- | :--- |}

14 Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year
15 Property subject to section 168 (f)(1) election
16 Other depreciation (including ACRS)

|  |  |
| :--- | :--- |
| 14 |  |
| 15 |  |
| 16 |  |


| Part III | MACRS Depreciation (Don't include listed property. See instructions.) |
| :--- | :--- |

Section A

18 If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here
Section B - Assets Placed in Service During 2019 Tax Year Using the General Depreciation System

|  | (a) Classification of property | (b) Month and year placed in service | (c) Basis for depreciation (business/investment use only - see instructions) | (d) Recovery period | (e) Convention | (f) Method | (g) Depreciation deduction |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 19a | 3-year property |  |  |  |  |  |  |
| b | 5-year property |  |  |  |  |  |  |
| c | 7-year property |  | 17,572. | 7 YRS. | MQ | 200DB | 628. |
| d | 10-year property |  |  |  |  |  |  |
| e | 15-year property |  |  |  |  |  |  |
| f | 20-year property |  |  |  |  |  |  |
| g | 25-year property |  |  | 25 yrs. |  | S/L |  |
| h | Resid | / |  | 27.5 yrs. | MM | S/L |  |
| h | Residential rental property | / |  | 27.5 yrs. | MM | S/L |  |
|  |  | 1 |  | 39 yrs . | MM | S/L |  |
|  | ty | 1 |  |  | MM | S/L |  |

## Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

| $\mathbf{2 0 a}$ Class life |  |  |  |  | S/L |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| $\mathbf{b}$ 12-year |  |  | 12 yrs. |  | S/L |  |
| $\mathbf{c} 30$-year | $/$ |  | 30 yrs. | MM | $\mathrm{S} / \mathrm{L}$ |  |
| $\mathbf{d}$ 40-year | $/$ |  | 40 yrs. | MM | $\mathrm{S} / \mathrm{L}$ |  |


\section*{| Part IV | Summary (See instructions.) |
| :--- | :--- |}

21 Listed property. Enter amount from line 28
22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.
23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs
entertainment, recreation, or amusement.)
Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24 a , 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.
Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

| 24a Do you have evidence to support the business/investment use claimed? |  |  |  | Yes $\square$ No | 24b If "Yes," is the evidence written? |  |  | Yes $\square \mathrm{N}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| (a) <br> Type of property (list vehicles first) | (b) Date placed in service | (c) <br> Business/ investment use percentage | (d) <br> Cost or other basis | (e) <br> Basis for depreciation (business/investment use only) | (f) <br> Recovery period | (g) <br> Method/ Convention | $\begin{gathered} \text { (h) } \\ \text { Depreciation } \\ \text { deduction } \end{gathered}$ | (i) <br> Elected section 179 cost |
| 25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than $50 \%$ in a qualified business use |  |  |  |  |  | 25 |  |  |

26 Property used more than $50 \%$ in a qualified business use:


## Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than $5 \%$ owner," or related person. If you provided vehicles to your employees, first answer the questions in Section $C$ to see if you meet an exception to completing this section for those vehicles.
30 Total business/investment miles driven during the year (don't include commuting miles)
31 Total commuting miles driven during the year
32 Total other personal (noncommuting) miles driven
33 Total miles driven during the year.
Add lines 30 through 32
34 Was the vehicle available for personal use during off-duty hours?
35 Was the vehicle used primarily by a more than $5 \%$ owner or related person?
36 Is another vehicle available for personal use?

| (a) <br> Vehicle |  | (b) <br> Vehicle |  | (c) <br> Vehicle |  | (d) <br> Vehicle |  | (e) <br> Vehicle |  | (f) <br> Vehicle |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
| Yes | No | Yes | No | Yes | No | Yes | No | Yes | No | Yes | No |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |

## Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who aren't more than 5\% owners or related persons.
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your
employees?
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your
employees? See the instructions for vehicles used by corporate officers, directors, or $1 \%$ or more owners
39 Do you treat all use of vehicles by employees as personal use?
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?
41 Do you meet the requirements concerning qualified automobile demonstration use?
Note: If your answer to $37,38,39,40$, or 41 is "Yes," don't complete Section B for the covered vehicles.

\section*{| Part VI | Amortization |
| :--- | :--- |}


| (a) Description of costs | (b) <br> Date amortization <br> begins |  | (d) Code section | (e) <br> Amortization period or percentage | (f) <br> Amortization for this year |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 42 Amortization of costs that begins during your 2019 tax year: |  |  |  |  |  |
|  | : $\quad$ : |  |  |  |  |
|  | $\vdots \quad \vdots$ |  |  |  |  |
| 43 Amortization of costs that began before your 2019 tax year |  |  |  |  |  |
| 44 Total. Add amounts in column (f). See the instructions for where to report |  |  |  |  |  |

