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Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

OMB No 1545-0052

**2009**

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2009, or tax year beginning

, 2009, and ending

, 20

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.

Name of foundation

THE LAWRENCE AND SYLVIA WONG FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

6378 HART DRIVE

City or town, state, and ZIP code

KALAMAZOO, MI 49009

A Employer identification number

38-3244488

B Telephone number (see page 10 of the instructions)

(269) 344-9236

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐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 ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end

of year (from Part II, col. (c), line

16) \$ 1,130,266.

J Accounting method

☒ Cash☐ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis)

**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 page 11 of the instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments	1,458.	1,458.		
4 Dividends and interest from securities	24,608.	23,321.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-136,548.			
b Gross sales price for all assets on line 6a	515,886.			
7 Capital gain net income (from Part IV, line 2)		46,011.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	-110,482.	70,790.		
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule) ATCH 1	480.	0.	0.	480.
b Accounting fees (attach schedule) ATCH 2	2,767.	2,767.	0.	0.
c Other professional fees (attach schedule) *	7,959.	7,959.		
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) *	732.	732.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) ATCH 5	25.			
24 Total operating and administrative expenses. Add lines 13 through 23	11,963.	11,458.	0.	480.
25 Contributions, gifts, grants paid	72,500.			72,500.
26 Total expenses and disbursements. Add lines 24 and 25	84,463.	11,458.	0.	72,980.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-194,945.			
b Net investment income (if negative, enter -0-)		59,332.		
c Adjusted net income (if negative, enter -0-)			-0-	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

\* ATCH 3 JSA \*\* ATCH 4

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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 . . . . .		185,521.	89,863.	89,863.
	3	Accounts receivable ▶ 1,070.				
		Less allowance for doubtful accounts ▶		109.	1,070.	1,070.
	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 page 16 of the 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 . . . . .				
	10 a	Investments - U S and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule) . . . . .	1,199,917.	1,099,454.	1,039,333.	
	c	Investments - corporate bonds (attach schedule) . . . . .				
	11	Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation (attach schedule) ▶					
12	Investments - mortgage loans . . . . .					
13	Investments - other (attach schedule) . . . . .					
14	Land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .	1,385,547.	1,190,387.	1,130,266.		
Liabilities	17	Accounts payable and accrued expenses . . . . .	215.	0.		
	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) . . . . .	215.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted . . . . .				
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>					
	27	Capital stock, trust principal, or current funds . . . . .				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .				
	29	Retained earnings, accumulated income, endowment, or other funds . . . . .	1,385,332.	1,190,387.		
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	1,385,332.	1,190,387.		
31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	1,385,547.	1,190,387.			

## Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	1,385,332.
2	Enter amount from Part I, line 27a . . . . .	2	-194,945.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3 . . . . .	4	1,190,387.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	1,190,387.

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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 (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b> SEE PART IV SCHEDULE					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2</b> Capital gain net income or (net capital loss) . . . . .			<b>2</b>	46,011.	
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">           { If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div> <div style="font-size: 2em;">}</div> </div>					
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):			<b>3</b>		
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">           If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions).            If (loss), enter -0- in Part I, line 8. . . . .         </div> <div style="font-size: 2em;">}</div> </div>					

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? . . . . ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	137,249.	1,447,315.	0.094830
2007	25,399.	427,093.	0.059469
2006	26,795.	422,113.	0.063478
2005	23,082.	430,489.	0.053618
2004	18,010.	432,438.	0.041648
<b>2</b> Total of line 1, column (d) . . . . .			<b>2</b> 0.313043
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . . .			<b>3</b> 0.062609
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 . . . . .			<b>4</b> 1,056,726.
<b>5</b> Multiply line 4 by line 3 . . . . .			<b>5</b> 66,161.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b) . . . . .			<b>6</b> 593.
<b>7</b> Add lines 5 and 6 . . . . .			<b>7</b> 66,754.
<b>8</b> Enter qualifying distributions from Part XII, line 4 . . . . .			<b>8</b> 72,980.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
	Date of ruling or determination letter _____ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	593.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	593.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	593.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	18.
b	Exempt foreign organizations-tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	725.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d	7	743.
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	4.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	146.
11	Enter the amount of line 10 to be Credited to 2010 estimated tax 146. Refunded	11	

**Part VII-A Statements Regarding Activities**

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c	Did the foundation file Form 1120-POL for this year?		X
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? If "Yes," attach a detailed description of the activities		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
4b	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? 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?	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the 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	X	
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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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**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 page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <input type="checkbox"/> N/A				
14	The books are in care of <input type="checkbox"/> JAMES VANDERROEST Telephone no <input type="checkbox"/> 269-344-9236			
Located at <input type="checkbox"/> 834 KING HIGHWAY, STE 110, KALAMAZOO, MI ZIP + 4 <input type="checkbox"/> 49001				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <input type="checkbox"/> 15			

**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.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <input type="checkbox"/>		
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 page 20 of the instructions)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 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 2009)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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 2009?	4b	X

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

- 5 a** During the year did the foundation pay or incur any amount to
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No
- b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☒ **5b**
- Organizations relying on a current notice regarding disaster assistance check here ☒
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No
- If "Yes," attach the statement required by Regulations section 53.4945-5(d)
- 6 a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No **6b**
- If "Yes" to 6b, file Form 8870
- 7 a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No **7b**

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the 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
ATTACHMENT 6		-0-	-0-	-0-

**2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the 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

**Total number of other employees paid over \$50,000** ☐ **NONE**

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**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services . . . . . **NONE****Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1 N/A	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments** (see page 23 of the instructions)

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

Amount

1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	

**Total.** Add lines 1 through 3 . . . . .

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	931,543.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	141,275.
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions)	<b>1c</b>	0.
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	1,072,818.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	1,072,818.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	16,092.
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,056,726.
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	52,836.

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	52,836.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	593.
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	593.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	52,243.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	52,243.
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	52,243.

**Part XII Qualifying Distributions**(see page 25 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	72,980.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	0.
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	0.
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	0.
<b>4</b>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	72,980.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	<b>5</b>	593.
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	72,387.

**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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7 . . . . .				52,243.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only . . . . .				
b Total for prior years 20 07, 20 06, 20 05 . . . . .				
3 Excess distributions carryover, if any, to 2009				
a From 2004 . . . . .	0.			
b From 2005 . . . . .	0.			
c From 2006 . . . . .	0.			
d From 2007 . . . . .	0.			
e From 2008 . . . . .	0.			
f Total of lines 3a through e . . . . .	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 72,980.				
a Applied to 2008, but not more than line 2a . . . . .				
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions) . . . . .				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions) . . . . .				
d Applied to 2009 distributable amount . . . . .				52,243.
e Remaining amount distributed out of corpus . . . . .	20,737.			
5 Excess distributions carryover applied to 2009 . (If an amount appears in column (d), the same amount must be shown in column (a) )				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .	20,737.			
b Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
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. . . . .				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions . . . . .				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions . . . . .				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 . . . . .				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .	20,737.			
10 Analysis of line 9				
a Excess from 2005 . . . . .	0.			
b Excess from 2006 . . . . .	0.			
c Excess from 2007 . . . . .	0.			
d Excess from 2008 . . . . .	0.			
e Excess from 2009 . . . . .	20,737.			

Form 990-PF (2009)

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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 2009, enter the date of the ruling . . . . .

b Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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 . . . . .					
b 85% of line 2a . . . . .					
c Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
d Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets . . . . .					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 8 for each year listed . . . . .					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
(3) Largest amount of support from an exempt organization . . . . .					
(4) Gross investment income . . . . .					

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 of the 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) )

SYLVIA WONG

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:**

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. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

ATTACHMENT 7

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

NO SPECIFIC APPLICATION REQUIRED AT THIS TIME

c Any submission deadlines

ALL SUBMISSIONS MUST BE FILED BETWEEN JUNE 1 AND SEPTEMBER 30

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

ATTACHMENT 8

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

<div>Recipient</div> <div>Name and address (home or business)</div>	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
<b>a Paid during the year</b>  ATTACHMENT 9				
<b>Total . . . . .</b>			<b>▶ 3a</b>	72,500.
<b>b Approved for future payment</b>				
<b>Total . . . . .</b>			<b>▶ 3b</b>	

Form 990-PF (2009)





**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL CAPITAL GAIN DISTRIBUTIONS					318.	
515,568.		PUBLICLY TRADED SECURITIES PROPERTY TYPE: SECURITIES 469,875.					VARIOUS 45,693.	VARIOUS
TOTAL GAIN (LOSS) .....							<u>46,011.</u>	

ATTACHMENT 1FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
ATTORNEY FEES	480.			480.
TOTALS	<u>480.</u>	<u>0.</u>	<u>0.</u>	<u>480.</u>

ATTACHMENT 2FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
ACCOUNTING FEES	2,767.	2,767.		
TOTALS	<u>2,767.</u>	<u>2,767.</u>	<u>0.</u>	<u>0.</u>

ATTACHMENT 3FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
CONSERVATOR FEES	7,959.	7,959.
TOTALS	<u>7,959.</u>	<u>7,959.</u>

FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
FOREIGN TAX WITHHOLDINGS	732.	732.
TOTALS	<u>732.</u>	<u>732.</u>

ATTACHMENT 5

FORM 990PF, PART I - OTHER EXPENSES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
MISCELLANEOUS BOOK EXPENSE	25.
TOTALS	<u>25.</u>

THE LAWRENCE AND SYLVIA WONG FOUNDATION

38-3244488

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 6

TITLE AND AVERAGE HOURS PER  
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

PRESIDENT/DIRECTOR

SYLVIA WONG  
6378 HART DRIVE  
KALAMAZOO, MI 49009

VP/TREASURER/DIRECTOR

MICHAEL WONG  
654 NW MOJI LANE  
BAINBRIDGE ISLAND, WA 98110-2726

DIRECTOR

LAURA WONG  
6092 N. 8TH STREET  
KALAMAZOO, MI 49009

SECRETARY

JAMES VANDERROEST  
834 KING HIGHWAY  
KALAMAZOO, MI 49001

GRAND TOTALS

THE LAWRENCE AND SYLVIA WONG FOUNDATION

38-3244488

ATTACHMENT 7

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

C/O JAMES VANDERROEST  
834 KING HIGHWAY, STE 110  
KALAMAZOO, MI 49001  
269-344-9236

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

FOUNDATION IS DEVOTED TO SUPPORTING ORGANIZATIONS WHICH BENEFIT SOUTHWESTERN MICHIGAN CHILDREN INCLUDING VISUAL AND PERFORMING ARTS; AS WELL AS EDUCATION ABOUT AND THE PRESERVATION OF ENDANGERED SPECIES OF PLANTS AND ANIMALS; FOR MEDICAL RESEARCH FOR THE UNDERSTANDING OF SJOGREN'S SYNDROME AND RELATED DISEASES AND THEIR TREATMENT; AND THE CONSERVATION OF AREAS OF SIGNIFICANT BIO-DIVERSITY.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
BAT CONSERVATION INTERNATIONAL P O. BOX 162603 AUSTIN, TX 78716	NONE	PUBLIC	GENERAL OPERATING	1,000.
CARNEGIE CENTER FOR THE ARTS 107 N. MAIN ST THREE RIVERS, MI 49093	NONE	PUBLIC	THE ARTS AND MUSIC PROGRAMS	12,000.
CARNEGIE CENTER FOR THE ARTS 107 N MAIN ST THREE RIVERS, MI 49093	NONE	PUBLIC	GENERAL OPERATING	2,000
CRESCENDO MUSIC ACADEMY EPIC CENTER, SUITE 12 359 SOUTH KALAMAZOO MALL KALAMAZOO, MI 49007	NONE	PUBLIC	GENERAL OPERATING	8,000.
FERNWOOD BOTANICAL GARDEN & NATURE PRSV 13988 RANGE LINE ROAD NILES, MI 49120	NONE	PUBLIC	ASSIST IN YOUTH EDUCATION	1,000
FOOD BANK OF SOUTH CENTRAL MICHIGAN 5451 WANYE RD BATTLE CREEK, MI 49037	NONE	PUBLIC	GENERAL OPERATING	8,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
FRED HUTCHINSON CANCER RESEARCH CENTER 1100 FAIRVIEW AVE. N. PO BOX 19024 SEATTLE, WA 98109	NONE PUBLIC		LEE NELSON CENTER FOR MEDICAL RESEARCH	2,500
KALAMAZOO INSTITUTE OF ARTS 314 SOUTH PARK STREET KALAMAZOO, MI 49007	NONE PUBLIC		SUMMER ART CAMP SCHOLARSHIPS	5,000.
KALAMAZOO NATURE CENTER 7000 N WESTNEDGE AVE KALAMAZOO, MI 49009	NONE PUBLIC		YOUTH OUTREACH	5,000
KALAMAZOO PUBLIC LIBRARY 315 S ROSE ST KALAMAZOO, MI 49007	NONE PUBLIC		GENERAL OPERATING	5,000
KALAMAZOO VALLEY COMMUNITY COLLEGE FDN 6767 WEST O AVENUE PO BOX 4070 KALAMAZOO, MI 49003-4070	NONE PUBLIC		GENERAL OPERATING	2,000.
KALAMAZOO VALLEY MUSEUM 230 NORTH ROSE STREET KALAMAZOO, MI 49003	NONE PUBLIC		GENERAL OPERATING	1,000.

FORM 990BE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SJOGREN'S SYNDROME FOUNDATION 6707 DEMOCRACY BLVD, STE 325 BETHESDA, MD 20817	NONE PUBLIC	GENERAL OPERATING	2,500.
SMARTSHOP METAL ARTS CENTER 516 E NORTH ST KALAMAZOO, MI 49007	NONE PUBLIC	GENERAL OPERATING	500.
SOUTHWEST MICHIGAN LAND CONSERVANCY 6851 S. SPRINKLE ROAD PORTAGE, MI 49002	NONE PUBLIC	GENERAL OPERATING	4,000
ST. JOSEPH COUNTY UNITED WAY 3517 E JEFFERSON BLVD SOUTH BEND, IN 46615	NONE PUBLIC	PARKS AND RECREATION	4,000
THE NATURE CONSERVANCY 4245 NORTH FAIRFAX DRIVE, SUITE 100 ARLINGTON, VA 22203-1606	NONE PUBLIC	THE MICHIGAN CHAPTER	4,000
THE NATURE CONSERVANCY 4245 NORTH FAIRFAX DRIVE, SUITE 100 ARLINGTON, VA 22203-1606	NONE PUBLIC	THE GREAT LAKES PROJECT	2,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION STATUS OF RECIPIENT			
UNIVERSITY OF MICHIGAN 1800 N DIXBORO ROAD ANN ARBOR, MI 48105	NONE	PUBLIC	MATTHAI BOTANICAL GARDENS	2,500.
UNIVERSITY OF MICHIGAN 1000 WALL STREET ANN ARBOR, MI 48105	NONE	PUBLIC	KELLOGG EYE CENTER	500.
TOTAL CONTRIBUTIONS PAID				<u>72,500.</u>

**SCHEDULE D**  
**(Form 1041)**

Department of the Treasury  
Internal Revenue Service

# Capital Gains and Losses

► **Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).**

OMB No 1545-0092

**2009**

Name of estate or trust

THE LAWRENCE AND SYLVIA WONG FOUNDATION

Employer identification number

38-3244488

**Note:** Form 5227 filers need to complete *only* Parts I and II.

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back	5	

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	45,693.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	318.
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back	12	46,011.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2009

**Part III Summary of Parts I and II****Caution: Read the instructions before completing this part.**

	(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
<b>13</b> Net short-term gain or (loss) . . . . .	<b>13</b>		
<b>14</b> Net long-term gain or (loss):			
a Total for year . . . . .	<b>14a</b>		46,011.
b Unrecaptured section 1250 gain (see line 18 of the wrkst ) . . . . .	<b>14b</b>		
c 28% rate gain . . . . .	<b>14c</b>		
<b>15</b> Total net gain or (loss). Combine lines 13 and 14a . . . . . ▶	<b>15</b>		46,011.

**Note:** If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet** necessary.

**Part IV Capital Loss Limitation**

<b>16</b> Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of	<b>16</b>	( )
a The loss on line 15, column (3) or b \$3,000 . . . . .		

**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

**Part V Tax Computation Using Maximum Capital Gains Rates**

**Form 1041 filers.** Complete this part only if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the worksheet on page 8 of the instructions if:

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

**Form 990-T trusts.** Complete this part only if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

<b>17</b> Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . . . .	<b>17</b>	
<b>18</b> Enter the smaller of line 14a or 15 in column (2) but not less than zero . . . . .	<b>18</b>	
<b>19</b> Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . . . . .	<b>19</b>	
<b>20</b> Add lines 18 and 19 . . . . .	<b>20</b>	
<b>21</b> If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- . . . ▶	<b>21</b>	
<b>22</b> Subtract line 21 from line 20. If zero or less, enter -0- . . . . .	<b>22</b>	
<b>23</b> Subtract line 22 from line 17. If zero or less, enter -0- . . . . .	<b>23</b>	
<b>24</b> Enter the smaller of the amount on line 17 or \$2,300 . . . . .	<b>24</b>	
<b>25</b> Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26, go to line 27 and check the "No" box <input type="checkbox"/> No. Enter the amount from line 23 . . . . .	<b>25</b>	
<b>26</b> Subtract line 25 from line 24 . . . . .	<b>26</b>	
<b>27</b> Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22 . . . . .	<b>27</b>	
<b>28</b> Enter the amount from line 26 (If line 26 is blank, enter -0-) . . . . .	<b>28</b>	
<b>29</b> Subtract line 28 from line 27 . . . . .	<b>29</b>	
<b>30</b> Multiply line 29 by 15% ( 15 ) . . . . .	<b>30</b>	
<b>31</b> Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .	<b>31</b>	
<b>32</b> Add lines 30 and 31 . . . . .	<b>32</b>	
<b>33</b> Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .	<b>33</b>	
<b>34</b> Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) . . . . .	<b>34</b>	

Schedule D (Form 1041) 2009



The Lawrence and Sylvia Wong Foundation  
 EIN: 38-3244488  
 Attachment to Schedule D, Capital Gains/Losses  
 Tax Year: 2009

* * Schedule D * *								
Shares/PV	Asset Sold	Date Acquired	How Acq	Date Sold	Holding Period	Sales Proceeds	Original Cost	Realized Gain/ Loss
1,713.280	American Funds Capital World Bond Fund F #431	01/23/2008	F	05/18/2009	Long	31,849.88	33,643.02	-1,793.14
15.180	American Funds Capital World Bond Fund F #431	03/11/2008	F	05/18/2009	Long	282.12	306.90	-24.78
200	Amgen Inc	09/04/2007	F	07/08/2009	Long	12,023.69	11,374.40	649.29
50	Apple Inc	09/05/2008	P	10/21/2009	Long	10,274.33	8,017.36	2,256.97
1,750	Blackrock Muniyield Mich Ins	01/16/2008	F	12/14/2009	Long	20,612.54	24,157.91	-3,545.37
500	Chesapeake Energy Corp	01/16/2008	F	12/14/2009	Long	12,314.73	10,852.30	1,462.43
1,450	Enerplus Res Fd Unit Tr G New	01/16/2008	F	12/14/2009	Long	33,020.44	45,792.07	-12,771.63
1,287	Frontier Communications Corp	01/16/2008	F	10/21/2009	Long	9,485.07	16,599.78	-7,114.71
2,000	Imperial Oil, Ltd.	12/31/2007	F	10/21/2009	Long	85,937.78	51,877.25	34,060.53
2,500	Imperial Oil, Ltd.	12/31/2007	F	12/14/2009	Long	93,177.85	64,846.55	28,331.30
200	JP Morgan Chase & Co	12/05/2007	F	10/21/2009	Long	9,193.76	9,123.02	70.74
725	Microsoft Corp	12/01/2006	F	03/02/2009	Long	11,578.18	20,993.61	-9,415.43
180	Mosaic Company	09/05/2008	P	12/28/2009	Long	10,933.54	16,798.75	-5,865.21
300	Oracle Corporation Com	08/13/2007	F	07/17/2009	Long	6,455.86	6,112.85	343.01
500	Pentair Inc	01/16/2008	F	10/21/2009	Long	16,870.01	16,887.62	-17.61
1,000	Suncor Energy Inc. New	01/16/2008	F	10/21/2009	Long	38,769.00	28,913.15	9,855.85
1,000	Suncor Energy Inc. New	01/16/2008	F	12/14/2009	Long	34,901.10	28,913.15	5,987.85
200	Target Corp	08/24/2006	F	10/21/2009	Long	10,011.90	9,524.26	487.64
0.500	American International Group Inc. New	11/11/1997	F	08/04/2009	Long	6.43	361.51	-355.08
100	Danaher Corp	09/17/2003	F	05/06/2009	Long	6,196.84	3,804.75	2,392.09
400	Wells Fargo & Co New	10/14/2002	F	08/20/2009	Long	11,007.84	9,537.15	1,470.69
15.700	American Funds Capital World Bond Fund F #431	06/19/2008	R	05/18/2009	Short	291.83	309.62	-17.79
16.900	American Funds Capital World Bond Fund F #431	10/03/2008	R	05/18/2009	Short	314.12	312.43	1.69
16.850	American Funds Capital World Bond Fund F #431	12/26/2008	R	05/18/2009	Short	313.28	315.46	-2.18
8.520	American Funds Capital World Bond Fund F #431	12/26/2008	R	05/18/2009	Short	158.39	159.48	-1.09
17.600	American Funds Capital World Bond Fund F #431	03/23/2009	R	05/18/2009	Short	327.13	317.27	9.86
10,000	Dell Inc. Sr Note 4.700% 04/15/13	02/24/2009	P	11/23/2009	Short	10,690.00	9,977.70	712.30
De minimus rule applies, Discount Market: 4.01 De minimus value: 100.00. No Discount applied.								
10,000	DuPont EI Nemour SR 4.750% 03/15/15	02/20/2009	P	09/16/2009	Short	10,600.00	9,900.00	700.00

The Lawrence and Sylvia Wong Foundation  
 EIN: 38-3244488  
 Attachment to Schedule D, Capital Gains/Losses  
 Tax Year: 2009

300	Gilead Sciences, Inc.	09/05/2008	P 08/19/2009 Short	13,340.66	14,432.94	-1,092.28
100	Norfolk Southern Corp	11/13/2008	P 05/06/2009 Short	3,759.99	5,003.00	-1,243.01
5,000	Simon Property Group LP	09/21/2009	P 11/05/2009 Short	5,100.00	4,956.25	143.75
	5.450% 03/15/13					
	De minimus rule applies, Discount Market: 1.55 De minimus value: 50.00. No Discount applied.					
115	Wal-Mart Stores Inc	10/27/2008	P 07/30/2009 Short	5,769.40	5,753.45	15.95
				515,567.69	469,874.96	45,692.73
Long-term Capital Gain Distributions						<u>319.00</u>
Total Gain						46,011.73

The Lawrence and Sylvia Wong Foundation  
 EIN: 38-3244488  
 Form 990PF  
 Attachment: Part II  
 Tax Year: 2009

Shares	Asset Description	Cost	Market
Prices As Of: 12/31/2009			
<b>Bank Money Market Funds</b>			
89,862.52	Southern Michigan Bk Mkt Acct	89,862.52	89,862.52
	SMBT 84336P996		
<b>Sub Total</b>			
		\$ 89,862.52	89,862.52
<b>Domestic Common Stock</b>			
325	Abbott Labs Inc		
	ABT 002824100	9,668.88	17,546.75
13	American International Group Inc. New	8,689.10	389.74
	AIG 026874784		
563	American Sts Wtr CO	21,061.83	
	AWR 029899101		
50	Apple Inc	8,017.35	10,536.60
	APPL 037833100		
175	Capital One Finl Corp	10,883.91	6,709.50
	COF 14C40H1C5		
525	Comcast Corp New	9,492.00	8,405.25
	CMCSK 20030N200		
100	Danaher Corp	3,804.74	7,520.00
	DHR 235851102		
346	DTE Energy Co	15,414.30	15,082.14
	DTE 233331107		
875	General Electric Corp	28,533.05	13,238.75
	GE 369604103		
100	General Mills Inc.	6,003.00	7,081.00
	GIS 370334104		

The Lawrence and Sylvia Wong Foundation

EIN: 38-3244488

Form 990PF

Attachment: Part II

Tax Year: 2009

Shares	Asset Description	Prices As Of : 12/31/2009	
		Cost	Market
35	IBM Corporation	3,840.07	4,581.50
	IBM 459200101		
800	Ishares Tr S&P Gbl Hlthcr	53,829.00	46,809.00
	IXJ 464287325		
200	Johnson & Johnson	6,109.98	12,882.00
	JNJ 478160104		
200	Medtronic	8,944.97	8,796.00
	MDT 585055106		
150	Morgan Stanley Dean Witter & Co.	8,627.89	4,440.00
	MS 617446448		
200	Pepsico Inc	7,204.99	12,160.00
	PEP 713448108		
1,350	Pfizer Inc	31,833.00	24,556.50
	PFE 717081103		
1,500	Powershares 2TF Trust	29,220.00	25,290.00
	PHO 73935X575		
50	Procter & Gamble Company	3,320.47	3,031.50
	PG 742718109		
1,000	Questar Corp	53,720.00	41,570.00
	STR 748356102		
1,000	Southwest Gas Corp	29,310.00	28,530.00
	SWX 844895102		
425	Stryker Corp Com	29,585.72	21,407.25
	SYK 863667101		
300	U S Bancorp	9,908.15	6,753.00
	USB 902973304		

The Lawrence and Sylvia Wong Foundation  
 EIN: 38-3244488  
 Form 990PF  
 Attachment: Part II  
 Tax Year: 2009

Shares	Asset Description	Prices As Of: 12/31/2009		
		Cost	Market	
125	Vanguard World Eds Telcomm ETF	10,441.83	7,063.75	
	VOX 92204A884			
<b>Sub Total</b>		\$ 408,464.23	354,316.06	
<b>Foreign Common Stock/Adr's</b>				
100	Research In Motion Ltd	10,639.04	6,754.00	
	RIMM 760975102			
<b>Sub Total</b>		\$ 10,639.04	6,754.00	
<b>Domestic Equity Mutual Funds</b>				
2,142.389	First Eagle Gold Fund - CL A #803	50,161.18	57,201.79	
	SGGDX 32008F408			
<b>Sub Total</b>		\$ 50,161.18	57,201.79	
<b>Intl Equity Mutual Funds</b>				
2,393.853	First Eagle Global Fund - CL A #801	105,543.15	95,706.24	
	SGENX 32008F507			
<b>Sub Total</b>		\$ 105,543.15	95,706.24	
<b>Taxable Fixed Income Funds</b>				
15,873.016	Allegiant Ultra Short Bond Fund Cl I #432	160,000.00	159,841.27	
	ASDIX 01748E872			
7,314.351	Federated Income Trust #36	77,661.47	77,312.69	
	FICMX 314199100			
7,198.717	Federated Total Return Bond Fund #328	77,696.07	78,250.06	
	FTRBX 31428Q101			
7,259.827	PIMCO Total Return Fund #35	78,538.11	78,406.13	
	PTTRX 6933390700			
4,269.057	Templeton Global Bond Advisor #616	52,717.23	54,174.33	
	TGBAX 880208400			

The Lawrence and Sylvia Wong Foundation  
 EIN: 38-3244488  
 Form 990PF  
 Attachment: Part II  
 Tax Year: 2009

Shares	Asset Description	Prices As Of : 12/31/2009		
		Cost	Market	
7,271.727	Vanguard GNMA Admiral #536	78,033.74	77,371.18	
	VEIJX 922031794			
	<i>Sub Total</i>	<i>\$ 524,846.62</i>	<i>525,355.85</i>	
	<i>Grand Total</i>	<i>\$ 1,189,316.74</i>	<i>1,129,196.26</i>	

Form **8868**

(Rev. April 2009)

Department of the Treasury  
Internal Revenue Service**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545-1709

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).  
**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file)** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of Exempt Organization <b>THE LAWRENCE AND SYLVIA WONG FOUNDATION</b>	Employer identification number <b>38-3244488</b>
	Number, street, and room or suite no. If a P O box, see instructions <b>6378 HART DRIVE</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions <b>KALAMAZOO, MI 49009</b>	

**Check type of return to be filed** (file a separate application for each return)

- |   |  |                                    |
|---|--|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)     | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                             | <input type="checkbox"/> Form 8870 |

- The books are in the care of ▶ **JAMES VANDERROEST**

Telephone No. ▶ **269 344-9236**

FAX No ▶ \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **08/15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶ ☒ calendar year **2009** or  
▶ ☐ tax year beginning \_\_\_\_\_, \_\_\_\_\_, and ending \_\_\_\_\_, \_\_\_\_\_

2 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	<b>743.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>18.</b>
<b>c Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	<b>725.</b>

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)