

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation
 ► Do not enter social security numbers on this form as it may be made public
 ► Go to www.irs.gov/Form990PF for instructions and the latest information

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OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning

, 2018, and ending

, 20

Name of foundation

CMS ENERGY FOUNDATION

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

Room/suite

ONE ENERGY PLAZA

EP8-210

City or town, state or province, country, and ZIP or foreign postal code

JACKSON, MI 49201-2276

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

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) ► \$ 39,275. J Accounting method Cash Accrual
 Other (specify) _____

04

6

- A Employer identification number
38-3575175
- B Telephone number (see instructions)
(517) 788-0432
- 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. ►

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

Revenue	(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 checked="" type="checkbox"/> if the foundation is not required to attach Sch B.				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities				
5a Gross rents				
b Net rental income or (loss) _____				
6a Net gain or (loss) from sale of assets not on line 10				
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2) .		0.		
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	0.	0.		
13 Compensation of officers, directors, trustees, etc.	0.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)				
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) ATCH 1 .	20.			20.
24 Total operating and administrative expenses.				
Add lines 13 through 23.	20.			20.
25 Contributions, gifts, grants paid	36,550.			61,550.
26 Total expenses and disbursements Add lines 24 and 25	36,570.			61,570.
27 Subtract line 26 from line 12				
a Excess revenue over expenses and disbursements	-36,570.			
b Net investment income (if negative, enter -0-)		0.		
c Adjusted net income (if negative, enter -0-)				

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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	84,745.	39,275.	39,275.
	2 Savings and temporary cash investments			
	3 Accounts receivable ►			
	Less allowance for doubtful accounts ►			
	4 Pledges receivable ►			
	Less allowance for doubtful accounts ►			
	5 Grants receivable.			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ►			
	Less allowance for doubtful accounts ►			
	8 Inventories for sale or use.			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule)			
	c Investments - corporate bonds (attach schedule)			
	11 Investments - land, buildings, and equipment basis ►			
Less accumulated depreciation ►				
12 Investments - mortgage loans.				
13 Investments - other (attach schedule)				
14 Land, buildings, and equipment basis ►				
Less accumulated depreciation ►				
15 Other assets (describe ►)				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	84,745.	39,275.	39,275.	
Liabilities	17 Accounts payable and accrued expenses	25,650.	41,750.	
	18 Grants payable.	25,000.		
	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)	50,650.	41,750.	
	Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/>			
	and complete lines 24 through 26, and lines 30 and 31			
	24 Unrestricted	34,095.	-2,475.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/>			
	and complete lines 27 through 31.			
	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				
30 Total net assets or fund balances (see instructions)	34,095.	-2,475.		
31 Total liabilities and net assets/fund balances (see instructions)	84,745.	39,275.		

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	34,095.
2 Enter amount from Part I, line 27a	2	-36,570.
3 Other increases not included in line 2 (itemize) ►	3	
4 Add lines 1, 2, and 3	4	-2,475.
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	-2,475.

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, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))		
a					
b					
c					
d					
e					
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	(k) Excess of col (i) over col (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2		
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in Part I, line 8			3		

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

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

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

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

If "Yes," the foundation 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) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	48,320.	66,478.	0.726857
2016	35,270.	39,440.	0.894270
2015	15,770.	51,007.	0.309173
2014	28,020.	79,883.	0.350763
2013	27,695.	108,007.	0.256419
2 Total of line 1, column (d)			2.537482
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			0.507496
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			42,958.
5 Multiply line 4 by line 3.			21,801.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6.			21,801.
8 Enter qualifying distributions from Part XII, line 4			8
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			61,570.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1 . . .	3	1	0.
Date of ruling or determination letter _____ (attach copy of 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			
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	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	6a 6b 6c 6d	7	0.
a	2018 estimated tax payments and 2017 overpayment credited to 2018			
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	8	9	0.
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> 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	10	11	Refunded
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 2019 estimated tax ►			

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a 1b 1c	Yes X Yes X Yes X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		
c	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		
d	Did the foundation file Form 1120-POL for this year?	2	X
e	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ► \$ 0. (2) On foundation managers ► \$ 0.		
f	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ 0.	3	X
g	Has the foundation engaged in any activities that have not previously been reported to the IRS?		
h	If "Yes," attach a detailed description of the activities	4a 4b	X X
i	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		
j	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	5	X
k	If "Yes," has it filed a tax return on Form 990-T for this year?		
l	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	6	X
m	If "Yes," attach the statement required by General Instruction T		
n	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either	7	X
o	• 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?		
p	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	8b	X
q	Enter the states to which the foundation reports or with which it is registered See instructions ► MI,		
r	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	X
s	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 2018 or the tax year beginning in 2018? See the instructions for Part XIV If "Yes," complete Part XIV		
t	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► CAROLYN A. BLOODWORTH Telephone no ► 517-788-0432 Located at ► ONE ENERGY PLAZA JACKSON, MI ZIP+4 ► 49201-2276		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ► 15 and enter the amount of tax-exempt interest received or accrued during the year		
16 At any time during calendar year 2018, 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 ►	16	X

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

	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	X No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	X No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input checked="" type="checkbox"/> Yes	X No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	X 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	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)	<input type="checkbox"/> 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 ►	1b	X
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 2018?	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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018?	<input type="checkbox"/> Yes	X No
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
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	X No
b If "Yes," did it have excess business holdings in 2018 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 2018)	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 2018?	4b	X

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

5a	During the year, did the foundation pay or incur any amount to	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.	<input type="checkbox"/> Yes	N/A	
Organizations relying on a current notice regarding disaster assistance, check here ► <input type="checkbox"/>				
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?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d)				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<input type="checkbox"/> Yes	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/> Yes	N/A	
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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. See instructions.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 2		0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0.

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		0.

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc		Expenses
1 SEE PART XV, LINES 2 & 3		
2		
3		
4		

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
1 NONE		
2		
3		
All other program-related investments See instructions		
4		
Total. Add lines 1 through 3 ►		

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes	
a Average monthly fair market value of securities	1a
b Average of monthly cash balances	1b 43,612.
c Fair market value of all other assets (see instructions)	1c
d Total (add lines 1a, b, and c)	1d 43,612.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e
2 Acquisition indebtedness applicable to line 1 assets	2
3 Subtract line 2 from line 1d.	3 43,612.
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 654.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5 42,958.
6 Minimum investment return. Enter 5% of line 5	6 2,148.

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

1 Minimum investment return from Part X, line 6	1 2,148.
2a Tax on investment income for 2018 from Part VI, line 5	2a
b Income tax for 2018 (This does not include the tax from Part VI)	2b
c Add lines 2a and 2b.	2c
3 Distributable amount before adjustments Subtract line 2c from line 1.	3 2,148.
4 Recoveries of amounts treated as qualifying distributions.	4
5 Add lines 3 and 4	5 2,148.
6 Deduction from distributable amount (see instructions)	6
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7 2,148.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes	
a Expenses, contributions, gifts, etc - total from Part I, column (d), line 26.	1a 61,570.
b Program-related investments - total from Part IX-B.	1b
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2
3 Amounts set aside for specific charitable projects that satisfy the	
a Suitability test (prior IRS approval required)	3a
b Cash distribution test (attach the required schedule)	3b
4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4 61,570.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b See instructions.	5 0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6 61,570.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				2,148.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.				
b Total for prior years 20 20 ,20				
3 Excess distributions carryover, if any, to 2018				
a From 2013	22,295.			
b From 2014	24,026.			
c From 2015	13,220.			
d From 2016	33,298.			
e From 2017	44,996.			
f Total of lines 3a through e	137,835.			
4 Qualifying distributions for 2018 from Part XII, line 4 ► \$ 61,570.				
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2018 distributable amount.				2,148.
e Remaining amount distributed out of corpus.	59,422.			
5 Excess distributions carryover applied to 2018 (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	197,257.			
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 instructions				
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019.				
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)				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	22,295.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	174,962.			
10 Analysis of line 9				
a Excess from 2014	24,026.			
b Excess from 2015	13,220.			
c Excess from 2016	33,298.			
d Excess from 2017	44,996.			
e Excess from 2018	59,422.			

Part XIV **Private Operating Foundations** (see instructions and Part VII-A, question 9)

NOT APPLICABLE

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))

NONE

- 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., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

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

ATCH 3

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

SEE ATTACHMENT 5

- ### c Any submission deadlines

NONE - APPLICATIONS ARE ACCEPTED AT ANY TIME

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

SEE ATTACHMENT 5

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
ATCH 4				
Total			► 3a	61,550.
<i>b Approved for future payment</i>				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a NONE					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments .					
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events . . .					
10 Gross profit or (loss) from sales of inventory . . .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)					
13 Total Add line 12, columns (b), (d), and (e)					13
(See worksheet in line 13 instructions to verify calculations.)					

(See worksheet in line 13 instructions to verify calculations)

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

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

Sign
Here

► Carly A Bloodworth 11-13-19
Signature of affirming witness Date

Date _____

► Secretary/Treasurer

Title

May the IRS discuss this return
with the preparer shown below?

Paid Preparer Use Only	Print/Type preparer's name MOLLIE P LONGHOUSE	Preparer's signature <i>Mollie P Longhouse</i>	Date 11.13.19	Check <input type="checkbox"/> if self-employed	PTIN P00294881
	Firm's name ► KPMG LLP		Firm's EIN ► 13-5565207		
	Firm's address ► 191 W. NATIONWIDE BLVD., SUITE 500 COLUMBUS, OH		43215	Phone no	614-249-2300

FORM 990PF, PART I - OTHER EXPENSES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>CHARITABLE PURPOSES</u>
STATE OF MICHIGAN - FILING FEE	20.	20.
TOTALS	<u>20.</u>	<u>20.</u>

ATTACHMENT 1

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

ATTACHMENT 2

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS	EXPENSE ACCT
			TO EMPLOYEE	AND OTHER ALLOWANCES
PATRICIA K. POPPE ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	CHAIRMAN AND DIRECTOR .10	0.	0.	0.
CAROLYN A. BLOODWORTH ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	SEC. / TREAS. AND DIRECTOR 15.00	0.	0.	0.
CATHERINE M. REYNOLDS ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	DIRECTOR .20	0.	0.	0.
RICHARD R. MUKHTAR ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	DIRECTOR .20	0.	0.	0.
BRANDON J. HOFMEISTER ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	PRESIDENT AND DIRECTOR 5.00	0.	0.	0.

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

38-3575175

NAME AND ADDRESS		TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	
------------------	--	--	--

REJUJI P. HAYES
ONE ENERGY PLAZA
EP8-210
JACKSON, MI 49201-2276

DIRECTOR
.20

JEAN-FRANCOIS BROISSOT
ONE ENERGY PLAZA
EP8-210
JACKSON, MI 49201-2276

DIRECTOR
.20

CATHERINE A. HENDRIEN
ONE ENERGY PLAZA
EP8-210
JACKSON, MI 49201-2276

DIRECTOR
.20

VENKAT DHENUVAKONDA RAO
ONE ENERGY PLAZA
EP8-210
JACKSON, MI 49201-2276

DIRECTOR
.20

BRIAN F. RICH
ONE ENERGY PLAZA
EP8-210
JACKSON, MI 49201-2276

DIRECTOR
.20

ATTACHMENT 2 (CONT'D)

NAME AND ADDRESS		COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
------------------	--	--------------	---	-----------------------------------

DIRECTOR
0.

DIRECTOR
0.

DIRECTOR
0.

DIRECTOR
0.

DIRECTOR
0.

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

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
GARRICK J. ROCHOW ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	DIRECTOR .20	0.	0.	0.
ROGER A. CURTIS ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	DIRECTOR .20	0.	0.	0.
GRAND TOTALS		0.	0.	0.

ATTACHMENT 2 (CONT'D)

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
GARRICK J. ROCHOW ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	DIRECTOR .20	0.	0.	0.
ROGER A. CURTIS ONE ENERGY PLAZA EP8-210 JACKSON, MI 49201-2276	DIRECTOR .20	0.	0.	0.
GRAND TOTALS		0.	0.	0.

ATTACHMENT 3

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

CAROLYN A. BLOODWORTH
ONE ENERGY PLAZA
JACKSON, MI 49201-2276
517-788-0432

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

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
----------------------------	--------------------------------	----------------------------------	--------

ARAB COMMUNITY CENTER FOR ECONOMIC & SOCIAL SERV. 2651 SAULINO CT DEARBORN, MI 48120-1556	NONE PC	ACCESS TO SCHOOL READINESS PROGRAM	25,000
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UNITED WAY OF COASTAL CAROLINA, INC PO BOX 1385 NEW BERN, NC 28563-1385	NONE PC	GENERAL SUPPORT	2,000
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UNITED WAY OF SALT LAKE 257 E 200 S, SUITE 300 SALT LAKE CITY, UT 84111-2078	NONE PC	GENERAL SUPPORT	3,500
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EASTER SEALS UCP NORTH CAROLINA & VIRGINIA, INC 5171 GLENWOOD AVENUE RALEIGH, NC 27612-3266	NONE PC	GENERAL SUPPORT	600
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FILER TOWNSHIP FIRE DEPARTMENT AUXILIARY 2706 NELSON ST MANISTEE, MI 49660-2430	NONE PC	MAGOON CREEK PARK IMPROVEMENTS	10,000
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GREEN MUSTACHES ROBOTICS 504 91 COLCHESTER CT CANTON, MI 48187-4442	NONE PC	GENERAL SUPPORT	450
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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

RECIPIENT NAME AND ADDRESS

GENESEE COUNTY HUMANE SOCIETY
 G3325 S DORT HWY
 BURTON, MI 45529-1446

GREENWICH LIBRARY
 101 W PUTNAM AVE
 GREENWICH, CT 06830-3328

FOUNDATION STATUS OF RECIPIENT

NONE
PCNONE
PC

PURPOSE OF GRANT OR CONTRIBUTION

DONATION IN HONOR OF TRAVIS WILSON

5,000

DONATION IN HONOR OF PHILIP LICCHNER

15,000

TOTAL CONTRIBUTIONS PAID

61,550ATTACHMENT 4 (CONT'D)

**Form 990-PF, 2018
CMS Energy
Foundation EIN
38-3575175**

Part XV, Line 2(b)

Information Regarding Contribution Programs:

(b.) Application Format

The initial application should be in narrative format, not exceeding two pages on one side each, and must include confirmation that the requesting organization is currently a non-profit corporation under Section 501(c)(3) of the Internal Revenue Code. After a preliminary review by the Foundation, the applicant may be asked to provide additional information.

Part XV, Line 2(d)

(d) Guidelines for Grant Seekers

CMS Energy Foundation was established to provide financial support to organizations classified by the Internal Revenue Service as tax exempt under Section 501(c)(3) of the Internal Revenue Code. Such organizations generally define their programs as those which:

- (1) Provide preventative solutions to problems faced by individuals and families who are unable to address their own needs;
- (2) Protect and enhance the physical environment;
- (3) Provide education initiatives, directed primarily to schools of higher learning;
- (4) Participate in community and civic endeavors that support programs focusing on economic development at the community, regional and statewide levels;
- (5) Increase awareness in culture and arts programs, creating wider recognition of cultural assets, and provide services to regions or populations who would otherwise be unable to participate.

The Foundation will consider requests from qualified organizations to support operating budgets and capital fund programs for construction, refurbishment or purchase of buildings, structures, equipment or other physical enhancements. Normally, the Foundation will not contribute to endowments.

Geographic

The principal focus of the CMS Energy Foundation includes those communities where CMS Energy has facilities and business investments.

Form 990-PF, 2018
CMS Energy
Foundation EIN
38-3575175

Part XV, Line 2(d)

(Continued)

No contributions are made to:

- individuals;
- organizations that do not qualify as charitable organizations as defined by the Internal Revenue Service;
- organizations that practice discrimination on the basis of sex, age, height, weight, marital status, race, religion, sexual orientation, creed, color, national origin, ancestry, disability, handicap, or veteran status;
- organizations whose operating activities are already supported by the United Way (except when the request is approved by the appropriate community United Way organization);
- political organizations and political campaigns;
- religious organizations when the grant will be used for denominational or sectarian purposes;
- labor or veterans organizations, fraternal orders or social clubs;
- debt reduction campaigns;
- sports tournaments
- talent or beauty contests
- loans for small business; or
- individual sponsorship related to fundraising.

The Foundation does not purchase tickets or make payments to events or celebrations to raise funds for charitable purposes, nor does it sponsor advertising supporting these efforts.

Volunteer Investment Program

The CMS Energy Foundation recognizes and supports employees and retirees who volunteer their time and talent to improve the quality of life in their communities. Through the Volunteer Investment Program, the Foundation awards grants to nonprofit organizations on behalf of employees and retiree volunteers.