

EXTENDED TO MAY 15, 2020

## Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2018

Open to Public Inspection

Form 990-PF

Department of the Treasury  
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

For calendar year 2018 or tax year beginning JUL 1, 2018, and ending JUN 30, 2019

Name of foundation  
**JOHN C. & VELMA DOIG IRREVOCABLE TRUST**

Number and street (or P O box number if mail is not delivered to street address) Room/suite  
**5200 CASCADE ROAD, S.E.**

City or town, state or province, country, and ZIP or foreign postal code  
**GRAND RAPIDS, MI 49546**

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)  
**\$ 2,645,600.**

J Accounting method: ☐ Cash ☒ Accrual  
☐ Other (specify) \_\_\_\_\_

A Employer identification number  
**38-6817716**

B Telephone number  
**(616) 228-6000**

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))

	(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				
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	60,442.	60,442.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	368,589.			
b Gross sales price for all assets on line 6a	902,695.			
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income				
12 Total. Add lines 1 through 11	429,031.	429,031.	0.	
13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees STMT 2	2,911.	0.	0.	728.
c Other professional fees STMT 3	29,790.	28,301.	0.	1,489.
17 Interest				
18 Taxes STMT 4	31,563.	0.	0.	0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 5	600.	0.	0.	0.
24 Total operating and administrative expenses. Add lines 13 through 23	64,864.	28,301.	0.	2,217.
25 Contributions, gifts, grants paid	122,624.			122,624.
26 Total expenses and disbursements. Add lines 24 and 25	187,488.	28,301.	0.	124,841.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	241,543.			
b Net investment income (if negative, enter -0-)		400,730.		
c Adjusted net income (if negative, enter -0-)			0.	

<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1	Cash - non-interest-bearing		5.	2.	2.
	2	Savings and temporary cash investments		44,937.	63,877.	63,877.
	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				
	7	Other notes and loans receivable ▶				
		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				
	b	Investments - corporate stock	STMT 6	456,675.	642,701.	1,099,558.
	c	Investments - corporate bonds				
	<b>Liabilities</b>	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other	STMT 7	1,260,218.	1,296,798.	1,482,163.
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)		1,761,835.	2,003,378.	2,645,600.
17		Accounts payable and accrued expenses				
18		Grants payable				
<b>Net Assets or Fund Balances</b>	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. ▶ <input type="checkbox"/>					
	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		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		1,761,835.	2,003,378.	
30	Total net assets or fund balances		1,761,835.	2,003,378.		
31	Total liabilities and net assets/fund balances		1,761,835.	2,003,378.		

**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	1,761,835.
2	Enter amount from Part I, line 27a	2	241,543.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,003,378.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,003,378.

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 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.)
1a				
b SEE ATTACHED STATEMENTS				
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 902,695.		534,106.	368,589.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			368,589.

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

368,589.

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).

If (loss), enter -0- in Part I, line 8

3

N/A

**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	117,206.	2,557,402.	.045830
2016	113,179.	2,361,639.	.047924
2015	116,894.	2,281,227.	.051242
2014	111,971.	2,369,444.	.047256
2013	102,467.	2,294,284.	.044662

2 Total of line 1, column (d)

2

.236914

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

3

.047383

4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5

4

2,605,817.

5 Multiply line 4 by line 3

5

123,471.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

4,007.

7 Add lines 5 and 6

7

127,478.

8 Enter qualifying distributions from Part XII, line 4

8

124,841.

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.

**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. 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 type="checkbox"/> and enter 1% of Part I, line 27b		1	8,015.
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	0.
3 Add lines 1 and 2		3	8,015.
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	8,015.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	4,031.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	12,100.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	16,131.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	8,116.	
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax <input type="checkbox"/> 8,116. Refunded <input type="checkbox"/>	11	0.	

**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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 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
c 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. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		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
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 500(c) (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 instructions <input type="checkbox"/> 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 2018 or the tax year beginning in 2018? See the instructions for Part XIV. 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

**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		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		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14 The books are in care of ► OLD NATIONAL BANK Telephone no. ► 616-228-6000 Located at ► 5200 CASCADE ROAD, S.E., GRAND RAPIDS, MI ZIP+4 ► 49546		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year		X
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 ►		X

**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 instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A	
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?		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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	N/A	
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 <input checked="" type="checkbox"/> 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.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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**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:

(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 4945(d)(4)(A)? See 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 instructions

N/A

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?

N/A

☐ Yes ☐ 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?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ 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.

(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
JOHN D. LOGAN, OLD NATIONAL	TRUSTEE			
5200 CASCADE ROAD, S.E.				
GRAND RAPIDS, MI 49546	0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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**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	2,544,429.
b	Average of monthly cash balances	1b	101,070.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,645,499.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,645,499.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	39,682.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,605,817.
6	Minimum investment return. Enter 5% of line 5	6	130,291.

**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	130,291.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	8,015.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	8,015.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	122,276.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	122,276.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	122,276.

**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	124,841.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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	124,841.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	124,841.

**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.

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**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				122,276.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			122,624.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$ 124,841.				
a Applied to 2017, but not more than line 2a			122,624.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				2,217.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				120,059.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				



**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)					
a Paid during the year					
MICHIGAN MASONIC HOME					122,624.
Total				▶ 3a	122,624.
b Approved for future payment					
NONE					
Total				▶ 3b	0.

Form 990-PF (2018)





JOHN C. & VELMA DOIG IRREVOCABLE TRUST

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.)
1a CINTAS CORP	P	VARIOUS	08/20/18
b COCA COLA CO	P	VARIOUS	08/20/18
c JOHNSON & JOHNSON	P	VARIOUS	08/20/18
d MICROSOFT CORP	P	VARIOUS	08/20/18
e PAYPAL HLDGS INC	P	VARIOUS	08/20/18
f SYSCO CORP	P	VARIOUS	08/20/18
g WALGREENS BOOTS ALLIANCE INC	P	VARIOUS	08/20/18
h AMERN EXPRESS CO	P	VARIOUS	09/21/18
i AUTOMATIC DATA PROCESSING INC	P	VARIOUS	09/21/18
j CINTAS CORP	P	VARIOUS	09/21/18
k DIAGEO PLC SP ADR	P	VARIOUS	09/21/18
l HOME DEPOT INC	P	VARIOUS	09/21/18
m JOHNSON & JOHNSON	P	VARIOUS	09/21/18
n MICROSOFT CORP	P	VARIOUS	09/21/18
o PAYCHEX INC	P	VARIOUS	09/21/18

(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 21,152.		3,714.	17,438.
b 4,607.		2,293.	2,314.
c 13,236.		6,166.	7,070.
d 10,724.		2,868.	7,856.
e 8,517.		2,095.	6,422.
f 7,376.		2,285.	5,091.
g 6,963.		3,173.	3,790.
h 57,184.		30,922.	26,262.
i 14,666.		4,032.	10,634.
j 41,988.		7,357.	34,631.
k 27,486.		11,608.	15,878.
l 21,167.		3,704.	17,463.
m 28,048.		12,331.	15,717.
n 44,428.		11,471.	32,957.
o 14,756.		5,096.	9,660.

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			17,438.
b			2,314.
c			7,070.
d			7,856.
e			6,422.
f			5,091.
g			3,790.
h			26,262.
i			10,634.
j			34,631.
k			15,878.
l			17,463.
m			15,717.
n			32,957.
o			9,660.

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).  
If (loss), enter "-0-" in Part I, line 8

3

JOHN C. & VELMA DOIG IRREVOCABLE TRUST

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.)
1a PAYPAL HLDGS INC	P	VARIOUS	09/21/18
b PFIZER INC	P	VARIOUS	09/21/18
c STARBUCKS CORP	P	VARIOUS	09/21/18
d SYSCO CORP	P	VARIOUS	09/21/18
e 3M CO	P	VARIOUS	09/21/18
f WALGREENS BOOTS ALLIANCE INC	P	VARIOUS	09/21/18
g CINTAS CORP	P	VARIOUS	01/18/19
h KROGER CO	P	VARIOUS	01/18/19
i PAYPAL HLDGS INC	P	VARIOUS	01/18/19
j ALCON INC	P	VARIOUS	05/14/19
k EQUIFAX INC	P	VARIOUS	05/14/19
l DIAMONDBACK ENERGY INC	P	VARIOUS	06/10/19
m FEDEX CORP	P	VARIOUS	06/10/19
n SELECT SECTOR SPDR ENERGY	P	VARIOUS	06/10/19
o BERKSHIRE HATHAWAY INC CL B	P	VARIOUS	06/14/19

(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 17,706.		4,191.	13,515.
b 8,617.		4,532.	4,085.
c 16,611.		4,049.	12,562.
d 14,602.		4,569.	10,033.
e 21,386.		8,773.	12,613.
f 14,324.		6,346.	7,978.
g 75,726.		15,633.	60,093.
h 3,367.		3,193.	174.
i 69,678.		16,134.	53,544.
j 4,071.		1,946.	2,125.
k 4,752.		5,540.	-788.
l 4,694.		6,160.	-1,466.
m 5,654.		8,741.	-3,087.
n 27,254.		27,772.	-518.
o 6,125.		6,610.	-485.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			13,515.
b			4,085.
c			12,562.
d			10,033.
e			12,613.
f			7,978.
g			60,093.
h			174.
i			53,544.
j			2,125.
k			-788.
l			-1,466.
m			-3,087.
n			-518.
o			-485.

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). If (loss), enter "-0-" in Part I, line 8 }	3	

JOHN C. & VELMA DOIG IRREVOCABLE TRUST

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.)
1a	BIOGEN INC	P	VARIOUS	06/27/19
b	CVS HEALTH CORP	P	VARIOUS	06/27/19
c	COGNIZANT TECH SOLUTIONS CORP	P	VARIOUS	06/27/19
d	SCHWAB CHARLES CORP	P	VARIOUS	06/27/19
e	SUNTRUST BKS INC	P	VARIOUS	06/27/19
f	AIG LITIGATION SETTLEMENT	P	VARIOUS	10/09/18
g	VANGUARD INTERMEDIATE TERM BOND INDEX FD	P	VARIOUS	02/20/19
h	VANGUARD INTERMEDIATE TERM BOND	P	VARIOUS	05/14/19
i	VANGUARD SHORT TERM BOND ETF	P	VARIOUS	10/09/18
j	VANGUARD SHORT TERM BOND ETF	P	VARIOUS	02/21/19
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 3,359.		4,735.	-1,376.
b 4,982.		5,959.	-977.
c 6,257.		7,611.	-1,354.
d 5,411.		7,831.	-2,420.
e 8,792.		9,863.	-1,071.
f 21.			21.
g 30,000.		30,403.	-403.
h 83,538.		86,450.	-2,912.
i 64,621.		67,191.	-2,570.
j 78,849.		80,759.	-1,910.
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-1,376.
b			-977.
c			-1,354.
d			-2,420.
e			-1,071.
f			21.
g			-403.
h			-2,912.
i			-2,570.
j			-1,910.
k			
l			
m			
n			
o			

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	368,589.
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). If (loss), enter "0-" in Part I, line 8 }	3	N/A



## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FOUNDERS TRUST - DIVIDENDS	60,317.	0.	60,317.	60,317.	60,317.
FOUNDERS TRUST - INTEREST	125.	0.	125.	125.	125.
TO PART I, LINE 4	60,442.	0.	60,442.	60,442.	60,442.

## FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	2,911.	0.	0.	728.
TO FORM 990-PF, PG 1, LN 16B	2,911.	0.	0.	728.

## FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	29,790.	28,301.	0.	1,489.
TO FORM 990-PF, PG 1, LN 16C	29,790.	28,301.	0.	1,489.

## FORM 990-PF

## TAXES

## STATEMENT

4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX WITHHOLDING & FEES	332.	0.	0.	0.
STATE INCOME TAX	3,937.	0.	0.	0.
FEDERAL INCOME TAX	27,294.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	31,563.	0.	0.	0.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
IRS APPLICATION FEE	600.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 23	600.	0.	0.	0.

## FORM 990-PF

## CORPORATE STOCK

## STATEMENT

6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AUTOMATIC DATA PROCESSING	17,339.	71,092.
HOME DEPOT INC	9,817.	55,112.
JOHNSON & JOHNSON	25,896.	58,498.
JPMORGAN CHASE & CO	25,330.	72,111.
MICROSOFT CORP	22,655.	105,828.
PFIZER INC	16,429.	31,407.
STARBUCKS CORPORATION	6,478.	40,238.
3M CO	14,915.	29,468.
COCA COLA	15,133.	33,607.
NOVARTIS AG	14,071.	30,132.
PAYCHEX INC	10,446.	33,739.
SYSCO	6,625.	20,509.
ESTEE LAUDER COS INC CL A	3,720.	5,310.
MONSTER BEVERAGE CORP	5,673.	7,021.
PROGRESSIVE CORP	6,483.	9,272.
DOVER CORP	4,668.	5,912.
FASTENAL CO	4,939.	5,997.
NORTHROP GRUMMAN CORP	9,583.	10,016.

ADOBE SYS INC	6,821.	11,491.
ANALOG DEVICES INC	5,265.	6,772.
GLOBAL PAYMENTS INC	4,586.	7,206.
SALESFORCE.COM INC	4,489.	6,524.
CHECK POINT SOFTWARE TECH LTD ORD	6,551.	7,630.
AMAZON.COM INC	6,757.	7,575.
TJX CO INC	12,441.	12,057.
COSTCO WHSL CORP NEW	8,409.	9,513.
PROCTER & GAMBLE CO	6,745.	8,772.
WALGREENS BOOTS ALLIANCE INC	8,884.	15,308.
CHEVRON CORP	8,399.	8,711.
BK OF AMER CORP	7,239.	6,757.
BLACKROCK INC	8,699.	8,447.
REGENERON PHARMACEUTICALS INC	4,221.	3,443.
SELECT SECTOR SPDR HLTH CARE ETF	37,633.	39,928.
CUMMINS INC	2,981.	3,427.
GENERAL DYNAMICS CORP	4,093.	4,546.
SELECT SECTOR SPDR INDUSTRIAL ETF	47,916.	54,659.
APPLE INC	10,753.	12,073.
VISA INC CL A	13,279.	15,620.
ALBEMARLE CORP	5,856.	5,844.
ALPHABET INC CL A	19,635.	19,490.
FACEBOOK INC CL A	9,507.	11,387.
COMMUNICATION SVCS SELECT SECTOR SPDR FD ETF	50,171.	55,471.
AON PLC CL A	8,198.	10,228.
JANUS HENDERSON ENTERPRISE CL I FD	53,344.	58,219.
VICTORY SYCAMORE ESTABLISHED VALUE CL I FD	53,344.	55,827.
MARTIN MARIETTA MATERIALS INC	6,285.	7,364.
TOTAL TO FORM 990-PF, PART II, LINE 10B	642,701.	1,099,558.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ISHARES TR S&P 500 INDEX	COST	53,339.	140,006.
VANGUARD INTL EQUITY INDEX ALLWORLD	COST	269,986.	296,762.
ISHARES RUSSELL 2000	COST	148,342.	196,863.
PIMCO MODERATE DURATION INSTL FUND	COST	138,147.	140,322.
VANGUARD SHORT TERM BOND	COST	254,592.	254,072.
VANGUARD SHORT TERM BOND INDEX	COST	130,000.	129,726.
VANGUARD INTERMED TERM BOND INDEX	COST		
ADM FD		302,392.	324,412.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,296,798.	1,482,163.