## Form **990-PF**

## **Return of Private Foundation**

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

OMB No 1545-0047
2019

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 for instructions and the latest information.

Open to Public Inspection

Fo	r cale	ndar year 2019 or tax year beginning		, and	ending	<u> </u>	
_		undation		,		r identification numbe	7
DΙ	JTGH'	T & LUCILE ALDRICH FOUNDATION					
		d street (or PO box number if mail is not delivered to street address)	Room	/suite	20-640	6772	
		x 766				number (see instructio	ns)
		n, state or province, country, and ZIP or foreign postal code					
	ACKS		49204-0	766	517-78	7-9481	
_		untry name Foreign province/state/county	Foreign posta			ion application is pendir	ng check here ▶□
		,,	<b>J</b> ,		· · · · · · · · · · · · · · · ·	on approation to porta-	
G	Chec	k all that apply Initial return Initial return	of a former public o	charity	D 1. Foreia	n organizations, check h	nere ► 🗍
•	01.00	Final return Amended ret	•	Julianty		_	<del>-</del>
					-	n organizations meeting here and attach comput	
ㅁ	Choo	L Address change L Name chang k type of organization ∑ Section 501(c)(3) exempt pr		4.		foundation status was to	_
			* * * * * * * * * * * * * * * * * * *	$\mathcal{M}$		07(b)(1)(A), check here	▶ 🗆
ш		on 4947(a)(1) nonexempt charitable trust  Other taxa					
l		narket value of all assets at J Accounting method	⊠ Cash ☐ A	ccrual	F If the four	ndation is in a 60-month	termination
		f year (from Part II, col (c), Other (specify)			under sec	tion 507(b)(1)(B), check	here •
	line 1	6) ► \$ 962,147. (Part I, column (d), must be	e on cash basis )				
P	art I	Analysis of Revenue and Expenses (The total of	(a) Revenue and	(h) No	unucatmont	(a) Advicted not	(d) Disbursements
		amounts in columns (b), (c), and (d) may not necessarily	expenses per	, ,	investment come	(c) Adjusted net income	for charitable purposes
_		equal the amounts in column (a) (see instructions))	books	"			(cash basis only)
, —	1	Contributions, gifts, grants, etc , received (attach schedule) .	509,073.				
•	2	Check ▶☐ if the foundation is not required to attach Sch. B					l
X	3	Interest on savings and temporary cash investments					
•	4	Dividends and interest from securities	6,488.	6	,488.		
•	5a	Gross rents				·	
	b	Net rental income or (loss)					
<u>a</u>	6a	Net gain or (loss) from sale of assets not on line 10					
Š	b	Gross sales price for all assets on line 6a			··-·		
Revenue	7	Capital gain net income (from Part IV, line 2)			697.		
2	8	Net short-term capital gain				17.	į
	9	Income modifications					
	10a	Gross sales less returns and allowances					
	b	Less Cost of goods sold					i
-	C	Gross profit or (loss) (attach schedule)					
	11	Other income (attach schedule)					[
	12	Total. Add lines 1 through 11	515,561.	7	,185.	17.	l
·	13	Compensation of officers, directors, trustees, etc	•				
nses	14	Other employee salaries and wages					
e	15	Pension plans, employee benefits					
Ž	16a	Legal fees (attach schedule)	5,097.	2	,548.		2,549.
Operating and Administrative Expe	b	Accounting fees (attach schedule)			•		•
ĕ	c	Other professional fees (attach schedule)	1.	-	_1.	_	
at	17	Interest				DECENTES	
st	18	Taxes (attach schedule) (see instructions)			<b>1</b> —	RECEIVED	
三	19	Depreciation (attach schedule) and depletion .		_	1/1		08
Ε	20	Occupancy			5	JUN 1 5 2020	101
¥	21	Travel, conferences, and meetings			191	- 10 1.11.11	IRS.
Þ	22	Printing and publications				CDEAL	74
ā	23	Other expenses (attach schedule)				PULN, UT	
g	24	Total operating and administrative expenses.		-			
ati	- '	Add lines 13 through 23	5,098.	2	,549.		2,549.
er	25	Contributions, gifts, grants paid .	44,000.		<u>, </u>		2,549. 44,000. 46,549.
o	26	Total expenses and disbursements. Add lines 24 and 25	49,098.	2	,549.		46,549.
_	27	Subtract line 26 from line 12	,		,		.,
			466,463.				
	á	Excess of revenue over expenses and disbursements	700,400.	1	,636.		
	b	Net investment income (if negative, enter -0-)		- 4	, 050.	17.	
	C	Adjusted net income (if negative, enter -0-) .				⊥ / •	l .

Pa	rt II	Balance Sheets Attached schedules and amounts in the description column	Beginning of year		End of year		
		should be for end-of-year amounts only (See instructions )	(a) Book Value	(b) Book Valu	ie	(c) Fair Market Value	
	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments .	31,434.	80,21	2.	80,212.	
	3	Accounts receivable •		·			
I		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				· <del></del>	
S	8	Inventories for sale or use		<del></del>			
š	9	Prepaid expenses and deferred charges					
Assets	10a	Investments—U S. and state government obligations (attach schedule)		_			
`	b	Investments—corporate stock (attach schedule)	201,927.	693,37	6	868,779.	
		Investments—corporate stock (attach schedule)	201, 327.	055,51	· ·	000,773.	
- [	С 11	Investments—corporate bonds (attach schedule)  Investments—land, buildings, and equipment basis		·			
ı	11	less assumulated decreasition (attach ashedula)					
	12	Less. accumulated depreciation (attach schedule)  Investments—mortgage loans		13,15	6	13,156.	
	13	Investments—mongage loans		10,10	0.	13,130.	
				<u> </u>	_		
	14						
	45	Less. accumulated depreciation (attach schedule)					
	15	Other assets (describe )					
	16	Total assets (to be completed by all filers—see the	233,361.	786,74	1	962,147.	
	17	Instructions Also, see page 1, item I)	233,301.	700,74	7.	JUZ, 147.	
	18	Accounts payable and accrued expenses .  Grants payable .					
es	19 Deferred revenue						
室	<b> </b>						
اق	20	Loans from officers, directors, trustees, and other disqualified persons					
Liabilities	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ► )  Total liabilities (add lines 17 through 22)		-			
-	23						
alances		Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. ▶□					
Ě	24	Net assets without donor restrictions .					
اق	24 25	Net assets with donor restrictions				*	
= -	23						
ξl		Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. ▶ ☒					
Net Assets or Fund B	26	Capital stock, trust principal, or current funds	233,361.	786,74	4		
<u>o</u>	26 27	Paid-in or capital surplus, or land, bldg, and equipment fund	200,001.	,00,74			
ets	27 28	Retained earnings, accumulated income, endowment, or other funds					
SS	28 29	Total net assets or fund balances (see instructions)	233,361.	786,74	4	- "	
₹	29 30	Total liabilities and net assets/fund balances (see	200,001.	,00,14	<u>.</u>		
<u>ا</u> ق	30	Instructions)	233,361.	786,74	4.		
_	rt III	Analysis of Changes in Net Assets or Fund Balances	200,001.	,00,14	. •		
		net assets or fund balances at beginning of year—Part II, column (a	) line 29 (must agre	e with			
•		of-year figure reported on prior year's return)	i, mio 20 (mast agre	,	1	233,361.	
2		amount from Part I, line 27a .			2	466,463.	
		increases not included in line 2 (itemize)  Gain		·	3	86,920.	
		nes 1, 2, and 3			4	786,744.	
		eases not included in line 2 (itemize)			5		
•		net assets or fund balances at end of year (line 4 minus line 5)—Pa			6	786,744.	

Part	IV Capital Gains and I	Losses for Tax on Investme	ent Income			
		(s) of property sold (for example, real estate, or common stock, 200 shs MLC Co )	te,	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr )
1a	RBC CAPITAL - ST	rcg		P	07/23/201	806/07/2019
b	RBC CAPITAL - LT	rcg		P	VA/RI/OUS	03/09/2018
c						
<u>d</u>						
<u>         e</u>	<del></del>	<del></del>				
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		other basis nse of sale		Gain or (loss) is (f) minus (g))
<u>a</u>	151.			134.		17.
<u>b</u>	32,348.			31,668.		680.
<u>c</u>						
<u>d</u>						
e						
	Complete only for assets show	ving gain in column (h) and owned b	by the foundation	on 12/31/69		Col (h) gain minus
	(i) FM V as of 12/31/69	(j) Adjusted basis as of 12/31/69	• · · · · · · · · · · · · · · · · · · ·		, , , ,	not less than -0-) <b>or</b> s (from col (h))
a						17.
<u>b</u>						680.
<u>C</u>						
<u>d</u>						
<u>e</u>						
2	Capital gain net income or (i	net canital loss) {	lso enter in Pai enter -0- in Par	•	2	697.
3	Net short-term capital gain o	or (loss) as defined in sections 1	222(5) and (6)			
		ne 8, column (c). See instruction		ter -0- in		
	Part I, line 8			J	3	17.
Part	V Qualification Under	r Section 4940(e) for Reduc	ed Tax on No	et Investment	Income	
(For o	optional use by domestic priva	ite foundations subject to the se	ction 4940(a) ta	ax on net investn	nent income)	
If and	tion 4040(d)/2) applies leave	this nort blank				
11 360	tion 4940(d)(2) applies, leave	tilis part blank				
		ection 4942 tax on the distributate lify under section 4940(e) Do no			ase period?	∐ Yes ⊠ No
1	Enter the appropriate amour	nt in each column for each year,	see the instruc	ctions before ma	king any entries	
	(a)	(b)		(c)	ĺ,	(d)
Cal	Base period years endar year (or tax year beginning in)	Adjusted qualifying distributions	Net value o	f noncharitable-use a		Distribution ratio b) divided by col (c))
	2018	31,026		170,88		0.181556
	2017	17,611		86,09		0.204565
	2016	2,642		82,53		0.032011
	2015	2,383		82,16		0.029004
	2014	2,915	· .	82,16	1.	0.035479
2	Total of line 1, column (d)				2	0.482615
3		the 5-year base period—divide	the total on lin	e 2 bv 5 0. or bv		
	<u> </u>	ndation has been in existence if			3	0.096523
4	Enter the net value of nonch	aritable-use assets for 2019 fro	m Part X, line 5	5 .	4	392,715.
5	Multiply line 4 by line 3			•	5	37,906.
6 Enter 1% of net investment income (1% of Part I, line 27b)					6	46.
		moonio (170 or 1 art I, line 270)				
7	Add lines 5 and 6 .				7	37,952.
8	Enter qualifying distributions If line 8 is equal to or greater Part VI instructions	s from Part XII, line 4 r than line 7, check the box in Pa	art VI, line 1b, a	and complete tha	8 at part using a 19	46,549. 6 tax rate See the

orm 9	90-PF (2019) DWIGHT & LUCILE ALDRICH FOUNDATION 20-64	<u> 406/</u>	12	age 4			
art	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instruction	ns)					
1a	Exempt operating foundations described in section 4940(d)(2), check here   and enter "N/A" on line 1						
	Date of ruling or determination letter (attach copy of letter if necessary—see instructions)						
þ	Domestic foundations that meet the section 4940(e) requirements in Part V, check		4	6.			
	here ▶ 🖾 and enter 1% of Part I, line 27b						
С	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-)		0				
3	Add lines 1 and 2		4	6.			
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		0				
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		4	6.			
6	Credits/Payments:						
а	2019 estimated tax payments and 2018 overpayment credited to 2019 6a						
b	Exempt foreign organizations—tax withheld at source 6b						
c	Tax paid with application for extension of time to file (Form 8868)  6c						
d	Backup withholding erroneously withheld 6d						
7	Total credits and payments Add lines 6a through 6d						
, B	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8						
)	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9		4	6.			
)	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid						
	Enter the amount of line 10 to be: Credited to 2020 estimated tax						
	VII-A Statements Regarding Activities						
la	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No			
u	participate or intervene in any political campaign?	1a	1.00	X			
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the						
_	instructions for the definition	1b		X			
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials	1.5		1			
	published or distributed by the foundation in connection with the activities						
С							
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year	1c		Х			
~	(1) On the foundation $\blacktriangleright$ \$ (2) On foundation managers $\blacktriangleright$ \$						
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed	•					
•	on foundation managers •\$	1					
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X			
	If "Yes," attach a detailed description of the activities	-		<u> </u>			
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	3		X			
la	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	<u> </u>	X			
ња b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	$\vdash$	<u> </u>			
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	$\vdash$	Х			
•	If "Yes," attach the statement required by General Instruction T	<b>–</b>	<del> </del>	<u> </u>			
;	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:		1	İ			
•	By language in the governing instrument, or			1			
	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?	6	X	ļ —			
,	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	7	X				
,		<b>-</b>	<u> </u>	_			
Ba	Enter the states to which the foundation reports or with which it is registered. See instructions  MI						
L							
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General	01-	<del>  ~  </del>				
	(or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	Х	$\vdash$			
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 2019 or the tax year beginning in 2019? See the instructions for Part XIV If			٠,			
	"Yes," complete Part XIV	9	ļ	X			
)	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their	40	v	l			
	names and addresses	10	ΙXΙ	1			

ran	Statements Regarding Activities (continued)			
		<u></u>	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the	۱.,		.,
40	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	4.		v
42	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	13		Λ
14	The books are in care of ▶ PHILIP J CURTIS  Telephone no ▶ 517-7	87-	948	ī
• •	Located at ► 120 W MICHIGAN AVE JACKSON MI ZIP+4 ► 49201			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—check here and enter the amount of tax-exempt interest received or accrued during the year .			▶ □
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority		Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		Χ
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country.			
Part	t 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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?		:	
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the			
	foundation agreed to make a grant to or to employ the official for a period after			
	termination of government service, if terminating within 90 days )			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in			
	Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
	Organizations relying on a current notice regarding disaster assistance, check here			
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that	4-		X
2	were not corrected before the first day of the tax year beginning in 2019?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	1c		<u>^</u>
2	operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
а	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines			
_	6d and 6e) for tax year(s) beginning before 2019?			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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		
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
_	<b>▶</b> 20, 20, 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
	are any same seeming are year.			
b	If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or			
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the			
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the			
	foundation had excess business holdings in 2019)	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 2019?	4b		X

Pari	: VII-B	Statements Regarding Activities for	or Whi	ich Form 47	7 <u>20 Ma</u>	y Be Req	uired (	(contın <u>ue</u>	ed)			
5a		e year, did the foundation pay or incur ar on propaganda, or otherwise attempt to			(section	on 4945(e))	?	Yes	⊠ No		Yes	No
		nce the outcome of any specific public elly or indirectly, any voter registration driv		(see section	4955);	or to carry o	on,	Yes	X No			
		de a grant to an individual for travel, stud		her sımilar pı	urposes	;?		Yes	X No			
	(4) Provi	de a grant to an organization other than a on 4945(d)(4)(A)? See instructions.	-	nritable, etc , organization described in		ed in	Yes	⊠ No				
	· ·	de for any purpose other than religious, c ses, or for the prevention of cruelty to ch			literary	, or educati	onal	Yes	X No		-	
b	If any ans	swer is "Yes" to 5a(1)–(5), did any of the	transa	ctions fail to	qualify	under the e	xceptic	ns descri	bed in			
	Regulation	ons section 53.4945 or in a current notice	regard	ding disaster	assista	nce? See ı	nstruct	ions .		5b		
С	If the ans	tions relying on a current notice regardin swer is "Yes" to question 5a(4), does the it maintained expenditure responsibility f	foundat	tion claım ex			ax	· · · Yes	► ∐ □ No			
6a	Did the fo	attach the statement required by Regulati bundation, during the year, receive any fu sonal benefit contract?				o pay prem	iums	☐ Yes	⊠ No			
b	•	oundation, during the year, pay premiums	s. direct	tlv or indirect	lv. on a	personal b	enefit o	_		6b		X
_		o 6b, file Form 8870	,	.,	.,,	<b>P</b> • • • • • • • • • • • • • • • • • • •						
7a b		e during the tax year, was the foundation a pa did the foundation receive any proceeds					the tra	Yes	No	7b	. <b></b>	
8	Is the fou	indation subject to the section 4960 tax of	n payn	nent(s) of mo				_	X No	7.5		-
Dari		ation or excess parachute payment(s) du nformation About Officers, Directo		<del></del>	ındəti	on Manac	iore F	Yes		nlove	96	
ı aı		and Contractors	, , , ,	ustees, i o	unau	on manag	je13, 1		aid Ein	picyc	,	
1		fficers, directors, trustees, and found	ation m	nanagers an	d their	compensa	ition. S	See instru	uctions.			
	(a) Name and address			e, and average rs per week ed to position	(If not paid, emp			Contribution oyee benefit ferred completers	plans	(e) Expense account other allowances		
	JIP J BOX 76		TRUS	TEE						_		
<b>-</b>												
2	Compen	sation of five highest-paid employees	(other	than those	include	ed on line	l—see			none,	enter	•
	(a) Name an	d address of each employee paid more than \$50,000	)	(b) Title, and a hours per v devoted to pe	veek	(c) Comper	nsation	(d) Contrib employee plans and compen	benefit deferred	(e) Expe	nse ac allowan	
IONE	<u> </u>											
								_				
						. —						
		other employees paid ever \$50,000										

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid E and Contractors (continued)	imployees,
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	
Total number of others receiving over \$50,000 for professional services	
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	
	•
2	-
3	
	-
4	
Part IX-B Summary of Program-Related Investments (see instructions)	<del>- ,</del>
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	-
2	
<b>2</b>	-
All other program-related investments See instructions	
3	
	-
Total. Add lines 1 through 3 .	

Form **990-PF** (2019)

Part	Minimum Investment Return (All domestic foundations must complete this part Foreign	1 toun	dations,
	see instructions )		
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		054 400
а	Average monthly fair market value of securities	1a	351,428. 47,267.
b	Average of monthly cash balances	1b	47,267.
C	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	398,695.
е	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	398,695.
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see		
	instructions)	4	5,980. 392,715.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	
6	Minimum investment return. Enter 5% of line 5	6	19,636.
Part		ons	
	and certain foreign organizations, check here   and do not complete this part )		
1	Minimum investment return from Part X, line 6 .	1	19,636.
2a	Tax on investment income for 2019 from Part VI, line 5 2a 46.		
b	Income tax for 2019 (This does not include the tax from Part VI)		
С	Add lines 2a and 2b	2c	46. 19,590.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	<u> 19,590.</u>
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	19,590.
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	19,590.
	XII Qualifying Distributions (see instructions)	11	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		46 540
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	46,549.
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	<u> </u>	
а	Suitability test (prior IRS approval required) .	3a	
b	Cash distribution test (attach the required schedule)	3b	46 540
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	46,549.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income		4.0
	Enter 1% of Part I, line 27b See instructions	5	46.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	46,503.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating when the column (b) is a subsequent year.	ether	the foundation
	qualifies for the section 4940(e) reduction of tax in those years		

Part	XIII Undistributed Income (se	e instructions)				
			(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1	Distributable amount for 2019 from line 7	Part XI,				19,590.
2	Undistributed income, if any, as of the er	nd of 2019				·
a	Enter amount for 2018 only .					
b	•	), 20				***
3	Excess distributions carryover, if any					1, 197
а	From 2014	,			•	
b	From 2015					
С	From 2016				:	
d	From 2017	13,306.				
е	From 2018	22,570.	35,876.			
f	Total of lines 3a through e .					
4	Qualifying distributions for 2019 from	n Part XII,				
	line 4 $\blacktriangleright$ \$ 46,549.					
	Applied to 2018, but not more than I					
b	Applied to undistributed income of p	· · · · · · · · · · · · · · · · · · ·				
	(Election required—see instructions	·				
С	Treated as distributions out of corpu	s (Election				
	required—see instructions)					19,590.
	Applied to 2019 distributable amoun		26,959.			19,390.
	Remaining amount distributed out of	· · · · · · · · · · · · · · · · · · ·	20,939.			
5	Excess distributions carryover applied (If an amount appears in column (d)	J				
	amount must be shown in column (a					
6	Enter the net total of each column	ı as				
	indicated below:					
а	Corpus Add lines 3f, 4c, and 4e Su	btract line 5	62,835.			
b	Prior years' undistributed income. Si	ubtract				
	line 4b from line 2b .					
C	Enter the amount of prior years' und					
	income for which a notice of deficier	-				
	been issued, or on which the section	1 4942(a)				
	tax has been previously assessed Subtract line 6c from line 6b Taxable	_				
d	amount—see instructions	e				
e	Undistributed income for 2018. Subt	ract line				
-	4a from line 2a. Taxable amount—se	i i				
	instructions					
f	Undistributed income for 2019 Subt	ract lines				
	4d and 5 from line 1 This amount m					
	distributed in 2020					
7	Amounts treated as distributions out	of corpus				
	to satisfy requirements imposed by s	section				
	170(b)(1)(F) or 4942(g)(3) (Election	may be				
	required—see instructions) .					
8	Excess distributions carryover from 2	i i	İ			•
	applied on line 5 or line 7 (see instru					
9	Excess distributions carryover to	2020.	60 005			,
	Subtract lines 7 and 8 from line 6a		62,835.		W-1-1	
10	Analysis of line 9					
a	Excess from 2015					
b	Excess from 2016 .	12 206				
C	Excess from 2017	13,306.				
d	Excess from 2018 .	22,570. 26,959.				I
е	Excess from 2019 .	40, JJJ.				]

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 120 fb, enter the date of the ruling b. Check box to indicate whether the foundation as a private operating foundation described in section.  2 Enter the lesser of the adjusted net income from Part X for easily year liketed 18% of the return from Part X for easily year liketed 18% of the return from Part X for easily year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of the each year liketed 18% of	Part		ons (see instruct						- Tage 10
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b Check box to midcate whether the foundation is a private operating foundation described in section   4492(010) or   4492(01	ıa				vate operating				
2a Enter the lesser of the adjusted net nonemer from Part to the minimum myestment return from Part X for each year listed  b 85% of line 2a  Cualifying distributions from Part XII, line 4, for each year listed  Amounts included in line 2 rot used directly for active conduct of exempt activities  Cualifying distributions made directly for active conduct of exempt activities  Cualifying distributions made directly for active conduct of exempt activities  Subtract line 2d from line 2c  Complete 3a, b, or of or the alienative test—enter  (1) Value of all assets  (2) Value of assets qualifying under section 49420(3)(6)(b)  b "Endowment atternative test—enter  (1) Total support other than gross investment income (interest, dividends, rents, payments on securities) care (section 49420)(3)(6)(b)  C "Support allernative test—enter  (1) Total support other than gross investment income (interest, dividends, rents, payments on securities) care (section 49420)(3)(6)(b)  (2) Support from general public and 5 or more exempt organizations as provided in section 49420(3)(6)(b)  (3) Largest amount of support from an exempt organization as provided in section 49420(3)(6)(b)(b)  b "Coross investment income (interest, dividends, rents, payments on securities clares (section 49420(3)(6)(b)(b))  c) Support from general public and 5 or more exempt organizations as provided in section 49420(3)(6)(b)(b)  and 5 or more exempt organizations are provided in section 49420(3)(6)(b)(b)  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  Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:  1 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  Information Regarding Contributio	h				cribed in section		7 4942(ı)(3	) or <b>[</b>	4942(1)(5)
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<ul> <li>b The form in which applications should be submitted and information and materials they should include</li> <li>c Any submission deadlines</li> <li>d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other</li> </ul>		conditions, complete items 2a, b, c, and	d d See instruction	าร					
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<ul> <li>c Any submission deadlines</li> <li>d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other</li> </ul>		·		•					
<ul> <li>c Any submission deadlines</li> <li>d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other</li> </ul>									
<ul> <li>c Any submission deadlines</li> <li>d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other</li> </ul>	b	The form in which applications should to	e submitted and ii	nformation and m	aterials they should	d include			
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other		· ·			•				
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other									
· · · · · · · · · · · · · · · · · · ·	С	Any submission deadlines							
	d	Any restrictions or limitations on award factors	s, such as by geog	raphical areas, c	harıtable fields, kın	ds of instit	utions, or	other	

Total

Part XV Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient show any relationship to Purpose of grant or status of Amount any foundation manager contribution recipient Name and address (home or business) or substantial contributor a Paid during the year JACKSON SCHOOL OF ARTS 2,000. 634 N MECHANIC 49202 MI JACKSON N/A PUBLICOPERATIONS WASH STATE UNIV FD 20,000. PO BOX 641925 99164 WA PULLMAN N/APUBLICOPERATIONS SOAR CAFE & FARM 7,500. 1100 WILDWOOD AVE 49202 MI JACKSON PUBLICOPERATIONS N/A MICHIGAN THEATRE JACK 10,000. 124 N MECHANIC ST 49201 MI JACKSON N/A PUBLICOPERATIONS CONCORD TWP CEMETERY 1,500. 112 HANOVER ST 49237 MI CONCORD A/MN/A PUBLIC JACSKON SYM ORCHESTRA 1,000. 241 W MICHIGAN AVE 49201 MI JACKSON N/A PUBLICOPERATIONS RISE ABOVE 1,000. 936 FLEMING AVE N/A PUBLICOPERATIONS 49202 MI JACKSON CONCORD YOUTH ORG 1,000. N/A PUBLICOPERATIONS 3a 44,000. Total Approved for future payment

Pa	rt X\	/I-A Analysis of Income-Producing Ac	tivities		-		_
		oss amounts unless otherwise indicated		isiness income	Excluded by secti	on 512, 513, or 514	(0)
1	_	gram service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
٠	_						
					-	<del></del> · .	
	c						
							-
	е.						
	f						
	g	Fees and contracts from government agencies					
2	_	mbership dues and assessments					
3		rest on savings and temporary cash investments					
4	Dıvi	dends and interest from securities			14	6,488.	
5	Net	rental income or (loss) from real estate					
	а	Debt-financed property					
		Not debt-financed property .					
6	Net	rental income or (loss) from personal property					
7		er investment income					
8		or (loss) from sales of assets other than inventory					
9		income or (loss) from special events					<del> </del>
10		ss profit or (loss) from sales of inventory					
11		er revenue a					
							<u> </u>
	C.						<del> </del>
	ď.	-					
12	e .	ototal Add columns (b), (d), and (e)				6,488.	
		al. Add line 12, columns (b), (d), and (e)			<u> </u>	13	6,488.
		ksheet in line 13 instructions to verify calculation	s)				0,100.
		/I-B Relationship of Activities to the A		ent of Exempt	Purposes		
Lin	e No. ▼		e is reported in c	olumn (e) of Part )	(VI-A contributed	I importantly to the ses) (See instruct	e nons )
1		N/A					
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Part	VVI	Information	Doggarding Trop	oforo to and Tran	ocations o	nd Bal	otionahina l	Mith Nonch	aritable		
Fait	AVI	Exempt Org		sfers to and Tran	Sactions a	nu Ken	ationships	WILLI MOHELL	aritable		
1	Did			engage in any of the	following	th any o	thor organiza	tion described	, 1	Yes	No
•		-	•	(c)(3) organizations)	-	-	_		1	163	HO.
		• • •	ei tilali Section 30 i	(c)(3) organizations)	or in section	J21, 161	ating to point	Jai			
_		anizations?									
а		·	porting foundation t	o a noncharitable ex	empt organiz	ation of			4 - (4)		- <del></del>
		Cash .		•	•			•	1a(1)		X
_		Other assets							1a(2)		X
þ		er transactions									
			a noncharitable ex						1b(1)		Х
				table exempt organiz	zation				1b(2)		X
	(3)	Rental of facilities	, equipment, or oth	er assets					1b(3)		X
	(4) I	Reimbursement a	rrangements						1b(4)		Χ
	(5) I	Loans or loan gua	arantees						1b(5)		Х
	(6) I	Performance of se	ervices or members	hip or fundraising so	licitations				1b(6)		Χ
С	Sha	ring of facilities, e	quipment, mailing l	ists, other assets, or	paid employ	ees	•		1c		X
d				emplete the following so			nould always s	now the fair ma	rket		
				given by the reporting							
	valu	e in any transaction	or sharing arrangem	rent, show in column (c	I) the value of	the good	ds, other asset	s, or services re	eceived		
(a) Lin	e no	(b) Amount involved	(c) Name of nor	nchantable exempt organiz	ation	(d) Descr	aption of transfers	, transactions, and	d sharing arra	ingeme	nts
		· · ·									
								<del>-</del>			
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					+						—
	$\longrightarrow$										
2a	Is th	e foundation direc	ctly or indirectly affi	liated with, or related	to, one or m	ore tax-	exempt organ	nizations	_	_	
	des	cribed in section 5	501(c) (other than s	ection 501(c)(3)) or i	n section 527	7?			☐ Yes	X N	0
b	If "Y	es," complete the	following schedule								
		(a) Name of organ	nization	(b) Type of o	organization		(0	) Description of re	elationship		
		-									
		· · · · · · · · · · · · · · · · · · ·									
	Unde	er penalties of penury, Lates	are that I have examined this	return, including accompanying	schedules and stat	tements, and	to the best of my kn	owledge and belief, it	is true,		
Sign				payer) is based on all information					ne IRS discuss	this setui	·
_			I Her	6-7-	ZN TRUS	STEE			ne preparer sho		
Here	Sic	gnature of officer or trus		Date	Title	7100		See in	structions [	X Yes	□No
	I OIG	Print/Type preparer's		Preparation August	<del>7                                    </del>		Date		PTIN		=
Paid		Phiip J C				-	05/18/202		1 10011	523	06
Prepa	rer			Tupe U	i D C			Toon chiploy			
Use C				tis&Br <b>e</b> l/nsk	i, P.C.			Г1	3-1956		<del></del>
036 (	, i ii y	Firm's address ▶	PO Box 766				P	none no51	7-787	-948	<u>3                                    </u>

## Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

## **Schedule of Contributors**

Attach to Form 990, Form 990-EZ, or Form 990-PF.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

**2019** 

**Employer identification number** 

20-6406772 DWIGHT & LUCILE ALDRICH FOUNDATION Organization type (check one) Filers of: Section: Form 990 or 990-EZ 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions General Rule X For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions **Special Rules** For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1 Complete Parts I and II For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990,

990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its

Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
DWIGHT & LUCILE ALDRICH FOUNDATION

Employer identification number

DWIGHT & LUCILE ALDRICH FOUNDATION 20-6406772 Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed (a) (b) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution 14 ALBERT ALDRICH TRUST Person PO Box 766 **Payroll** JACKSON MI **\$** 509,073. Noncash Foreign State or Province (Complete Part II for noncash contributions) Foreign Country (d) (a) (b) (c) **Total contributions** Type of contribution No. Name, address, and ZIP + 4 Person **Payroll Noncash** Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (c) (d) (a) (b) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person **Payroll** Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (a) (b) (c) (d) Name, address, and ZIP + 4 **Total contributions** Type of contribution No. Person **Payroll** Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (c) (d) (a) (b) Total contributions Name, address, and ZIP + 4 Type of contribution No. Person **Payroll** Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (b) (c) (d) (a) Name, address, and ZIP + 4 **Total contributions** Type of contribution No. Person Payroll Noncash Foreign State or Province (Complete Part II for noncash contributions) Foreign Country