Form 990-PF

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

1912

2019

▶ Go to www irs.gov/Form990PF for instructions and the latest information For calendar year 2019 or tax year beginning and ending Name of foundation A Employer identification number DANIEL & PAMELLA DEVOS FOUNDATION 38-3035976 Number and street (or P O box number if mail is not delivered to street address Room/suite B Telephone number 126 OTTAWA AVENUE NW, SUITE 500 (616) 643-4700 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here 49503 GRAND RAPIDS, MI Initial return of a former public charity G Check all that apply Initial return D 1. Foreign organizations, check here Final return Amended return 2 Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J Accounting method: Accrual F If the foundation is in a 60-month termination Other (specify) under section 507(b)(1)(B), check here (from Part II, col (c), line 16) 14, 917, 087. (Part I, column (d), must be on cash basis) Part I Analysis of Revenue and Expenses (a) Revenue and (b) Net investment (c) Adjusted net (d) Disbursements (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) charitable purpos (cash basis only) expenses per books income income 27,325,000 N/A Contributions, gifts, grants, etc., received if the foundation is not required to attach Sch. B. Interest on savings and temporary cash investments 2,485 2,473. STATEMENT 3 615. 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 RECENTE 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain DEC 0 4 2020 Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold OGDEN. c Gross profit or (loss) 1,228. STATEMENT 1,288 11 Other income 4,376. 27,328,713. Total Add lines 1 through 11 0. 0. О. 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 3 460. 46. 414. **b** Accounting fees STMT 4 328,080. 234. 327,846. c Other professional fees 17 Interest 18 Taxes 20 Occupancy
21 Travel, conferences, and meetings 19 Depreciation and depletion 731. 731. 0. 22 Printing and publications 652. 652. 0. STMT 5 23 Other expenses 24 Total operating and administrative 329,923 280 329,643. expenses. Add lines 13 through 23 12,141,500. 12,141,500. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 12,471,423. 280 12,471,143. Add lines 24 and 25 27 Subtract line 26 from line 12: 14,857,290. 8 Excess of revenue over expenses and disbursements

923501 12-17-19 LHA For Paperwork Reduction Act Notice, see instructions

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

Form **990-PF** (2019)

N/A

4,096

| | A i - | of Change | - :- NI-4 | Accets or | · Fund Balar | |
|------------|----------|------------|-----------|-----------|--------------|-------|
| Dart III I | Anaivsis | or Changes | s in Net | ASSELS OF | TUNO DAIAI | 10:25 |

| 1 | Total net assets or fund balances at beginning of year - Part II, column (a), line 29 | | |
|---|---|---|-------------|
| • | (must agree with end-of-year figure reported on prior year's return) | 1 | 59,786. |
| 2 | Enter amount from Part I, line 27a | 2 | 14,857,290. |
| 3 | Other increases not included in line 2 (itemize) | 3 | 0. |
| 4 | Add lines 1, 2, and 3 | 4 | 14,917,076. |
| 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 29 | 6 | 14,917,076. |

Form **990-PF** (2019)

| (a) List and describe the | kind(s) of property sold (for exa nouse; or common stock, 200 sh | ımple, real esta | | (b) ⊢ | low acquir - Purchase - Donation | red (d | ;) Date a (mo , da | icquired ly, yr.) | (d) Date sold (mo., day, yr.) |
|--|--|--|---------------------------------------|--------------|--|-------------|-----------------------|----------------------------|--|
| 1a | <u> </u> | <u></u> | | 1 | Donation | | | | |
| b NONE | | | | <u> </u> | | | | | |
| C | - | | | | | | | | |
| d | | | | | | | | | |
| e | | | | | | | | | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | | st or other basis expense of sale | | | (| | in or (loss (f) minus | |
| <u>a</u> | | 1 | | \dashv | | | | | |
| <u>b</u> | | - | | _ | | | | | |
| c d | | + | | \neg | | | | | |
| e | | <u> </u> | | \neg | | | | | |
| Complete only for assets showing of | nain in column (h) and owned by | the foundation | on 12/31/69 | | | m e | Sains (Co | ol (h) gaın | minus |
| (i) FMV as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) E> | cess of col (i) col (j), if any | | | col. (I | k), but n | ot less tha from col. (| n -0-) or |
| a | | | | | | | | | |
| b | | | | \Box | | | | | |
| c | | | | _ | | | | | |
| d | | | _ | | | | | | |
| <u>e</u> | | | | _ | | | | | |
| Capital gain net income or (net capital | al loss) $\left\{\begin{array}{l} 	ext{If gain, also enter} \\ 	ext{If (loss), enter -l} \end{array}\right.$ | er in Part I, line D- in Part I, line | 7 7 | } | 2 | | | | |
| Net short-term capital gain or (loss) If gain, also enter in Part I, line 8, co | | nd (6): | | ٦ | | | | | |
| If (loss), enter -0- in Part I, line 8 | ler Section 4940(e) for | D - J J | | Д | 3 | | | | |
| Part V Qualification Und For optional use by domestic private fo | | | | | | 1110011 | | <u> </u> | |
| roi optional use by domestic private to | unuations subject to the section | 4940(a) tax on | net mvestment m | CUINE | , | | | | |
| f section 4940(d)(2) applies, leave this | part blank. | | | | | | | | |
| vas the foundation liable for the section "Yes," the foundation doesn't qualify u | | | · · · · · · · · · · · · · · · · · · · | iod? | | | | | Yes X No |
| Enter the appropriate amount in eac | | | | ntries | | | | | == |
| (a) Base period years Calendar year (or tax year beginning | (b) | | Net value of no | (c) | ıtable-use | assets | | Distrit col (b) div | (d) oution ratio rided by col (c)) |
| 2018 | | 9,328. | | 3, | 782, | 596. | <u> </u> | | 3.76707 |
| 2017 | 11,87 | 9,128. | | 3, | 558, | 554. | | | 3.33819 |
| 2016 | | 0,911. | | | ,567, | | | | 2.46738 |
| 2015 | | 2,055. | | | 122, | | | | 1.23837 |
| 2014 | 4,97 | 9,037. | | 7, | 675, | <u>556.</u> | ļ., | | .64868 |
| Total of line 1, column (d) | | | | | | | 2 | <u></u> | 11.45970 |
| Average distribution ratio for the 5-y the foundation has been in existence | | on line 2 by 5 (|), or by the numbe | er of y | ears | | 3 | | 2.29194 |
| 4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5 | | | | 4 | | 740,575 | | | |
| 5 Multiply line 4 by line 3 | | | | 5 | | 1,697,354 | | | |
| Enter 1% of net investment income (| 1% of Part I, line 27b) | | | | | | 6 | | 41 |
| Add lines 5 and 6 | ···· | | | | | | 7 | | 1,697,395 |
| | art XII. line 4 | | | | | | 8 | | 2,471,143 |
| Enter qualifying distributions from P. If line 8 is equal to or greater than lir | | e 1h and comp | lete that nart usin | n a 10/ | tav rata | | <u> </u> | | <u> </u> |
| See the Part VI instructions. | • | o ib, and comp | ioto tilat part dom | y a i / | o lax rate | | | | |



| | 90-PF (2019) DANIEL & PAMELLA DEVOS FOUNDAT | ION | <u> 38-303</u> | <u>5976</u> | A | Page 4 |
|------|--|---|----------------|----------------|----------------|---|
| | VI Excise Tax Based on Investment Income (Section 4940 | | 1948 - see | <u>instruc</u> | ctions | <u>s)</u> |
| 1a 8 | xempt operating foundations described in section 4940(d)(2), check here 🕒 🔲 and e | nter "N/A" on line 1. |] | | | |
| | ate of ruling or determination letter: (attach copy of letter if nec | | | | | لــــــــــــــــــــــــــــــــــــــ |
| b [| omestic foundations that meet the section 4940(e) requirements in Part V, check here | ➤ X and enter 1% | 1 | | | 41. |
| (| f Part I, line 27b | | 1 1 | | | |
| c / | II other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% | of Part I, line 12, col. (b) | | | | |
| 2 1 | ax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; oth | ners, enter -0-) | 2 | | | 0. |
| 3 / | dd lines 1 and 2 | | 3 | | | <u>41.</u> |
| 1 5 | ubtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; of | hers, enter -0-) | 4 | | | 0. |
| , 1 | ax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | 5 | | | 41. |
| 6 (| redits/Payments: | | | | | |
| a 2 | 019 estimated tax payments and 2018 overpayment credited to 2019 | 6a 2,116 | . | | | - 1 |
| | xempt foreign organizations - tax withheld at source | 6b 0 | . I | | | - (|
| | ax paid with application for extension of time to file (Form 8868) | 6c O | 7 | | | |
| | ackup withholding erroneously withheld | 6d O | | | | |
| | otal credits and payments. Add lines 6a through 6d | | 7 | | 2,1 | 16. |
| | nter any penalty for underpayment of estimated tax. Check here if Form 2220 is atta | ched | 8 | | | 0. |
| | ax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | • | 9 | | | |
| | everpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | 10 | | 2,0 | 75. |
| | nter the amount of line 10 to be; Credited to 2020 estimated tax | 2,075. Refunded | 11 | | | 0. |
| ar | VII-A Statements Regarding Activities | | 1 | | | |
| | juring the tax year, did the foundation attempt to influence any national, state, or local legis | lation or did it participate or interve | ne in | | Yes | No |
| | ny political campaign? | | | 1a | | X |
| | id it spend more than \$100 during the year (either directly or indirectly) for political purpo: | ses? See the instructions for the de | finition | 1b | | X |
| | the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of | | | | | |
| | istributed by the foundation in connection with the activities. | any materials positions of | | | | |
| | old the foundation file Form 1120-POL for this year? | | | 1c | _ | X |
| | nter the amount (if any) of tax on political expenditures (section 4955) imposed during the | vear. | | '' | | |
| | 1) On the foundation. \blacktriangleright \$ 0 . (2) On foundation managers | | _ | | |] |
| | nter the reimbursement (if any) paid by the foundation during the year for political expendi | | <u>~</u> | į | | 1 |
| | nanagers. > \$ 0 • | tore tax imposses on realisation | | | |] |
| | las the foundation engaged in any activities that have not previously been reported to the IF | 157 | | 2 | | <u>x</u> |
| | is the logituation engaged in any activities that have not previously been reported to the in | 10. | | | | |
| | las the foundation made any changes, not previously reported to the IRS, in its governing is | actrument articles of incorporation | or | | |] |
| | | istroment, articles of incorporation | | 3 | <u> </u> | X |
| | ylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | .a | | 4a | | X |
| | old the foundation have unrelated business gross income of \$1,000 or more during the year | • | N/A | | | |
| | "Yes," has it filed a tax return on Form 990-T for this year? | | 14 / 14 | 4b 5 | | Х |
| | Vas there a liquidation, termination, dissolution, or substantial contraction during the year? | | | 13 | | |
| | "Yes," attach the statement required by General Instruction T | thor: | | | | |
| | are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied ei | uiti. | | | | |
| | By language in the governing instrument, or | u diventione that another contrate the cont | sta laur | | | |
| | By state legislation that effectively amends the governing instrument so that no mandator | y onections that conflict with the st | ale law | <u> </u> | <u>x</u> | |
| | emain in the governing instrument? | Late Decad II and Associated to 1997 | | 6 | X | |
| 7 | old the foundation have at least \$5,000 in assets at any time during the year? If "Yes," comp | iete Part II, coi. (c), and Part XV | | 7 | ^ | |
| Ba I | nter the states to which the foundation reports or with which it is registered. See instruction | ns. ► | | _ | | |
| | MI | | | _ | | |
| Ь | the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the A | ttorney General (or designate) | | | | |
| | f each state as required by General Instruction G? If "No," attach explanation | | | 8b | X | |
| | s the foundation claiming status as a private operating foundation within the meaning of se | ction 4942(j)(3) or 4942(j)(5) for ca | lendar | | | |
| | ear 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," com | | | 9 | | X |
| | old any persons become substantial contributors during the tax year? If "Yes," attach a schedu | | | 10 | | X |
| | | | | Form 99 | | |

923531 12-17-19

| <u>Forn</u> | n 990-PF (2019) DANIEL & PAMELLA DEVOS FOUNDATION 38-303 | <u> 976</u> | | Page |
|-------------|--|-------------|----------|---------------|
| Pa | art 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 | | Х |
| 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? | 13 | Х | |
| ., | Website address ► N/A | | | |
| 14 | The books are in care of ▶ ROBERT H. SCHIERBEEK Telephone no ▶ (616) | 543- | 470 | 0 |
| | Located at ▶126 OTTAWA, N.W., SUITE 500, GRAND RAPIDS, MI ZIP+4 ▶4 | | | |
| 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 | N | /A | |
| 16 | | | Yes | No |
| ٠٠ | securities, or other financial account in a foreign country? | 16 | | X |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the | ··· | | |
| | foreign country | | | |
| P: | art VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | | <u> </u> |
| `` | | Т | Yes | No |
| 4. | File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 3 During the year, did the foundation (either directly or indirectly): | — | | |
| 18 | | | | |
| | | 1 | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disgualified person? Yes X No | | | |
| | | | | |
| | (o) the second s | l | | |
| | | | | |
| | (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)? 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.) | | | |
| ı | o 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 | <u> </u> | Х |
| | Organizations relying on a current notice regarding disaster assistance, check here | | | |
| (| Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected | | <u> </u> | |
| | before the first day of the tax year beginning in 2019? | 1c | | Х |
| 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)): | | | |
| 8 | 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 >,, | ŀ | | |
| t | 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 | 2b | | |
| (| : If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | |
| | <u> </u> | | | |
| 38 | a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| | during the year? | | | |
| ŧ | o If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after | | | |
| | May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose | | | |
| | of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, | | | |
| | Schedule C, to determine if the foundation had excess business holdings in 2019.) N/A | 3b | | |
| | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 48 | | X |
| t | 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 isopardy before the first day of the tay year beginning in 20102 | 1 46 | | Y |

4b X Form **990-PF** (2019)

| Pa | rt V | /II-B | Statements Regarding Activities for Which F | orm 4720 May Be R | equired (contin | ued) | | | |
|----------|---|-----------|--|------------------------------------|-----------------------------|--|---------------|--------------------|--------|
| 5a | Dur | ing the | year, did the foundation pay or incur any amount to. | | | | | Yes | No |
| | (1) | Carry | in propaganda, or otherwise attempt to influence legislation (section | 4945(e))? | Y | es 🗓 No | | | |
| | (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, | | | | | | | | |
| | any voter registration drive? | | | | | | | | |
| | (3) | Provid | e a grant to an individual for travel, study, or other similar purposes? | • | Y | es 🗓 No | | | |
| • | (4) | Provid | e a grant to an organization other than a charitable, etc., organization | described in section | | | | | |
| | | 4945(0 |)(4)(A)? See instructions | | Y | es 🗓 No | | | |
| | (5) | Provid | e for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or f | | | | | ľ |
| | | the pre | vention of cruelty to children or animals? | | Y | es 🗶 No | | | |
| b | If ar | ny answ | er is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und | ler the exceptions described | ın Regulatıons | | | | |
| | sect | tion 53 | 1945 or in a current notice regarding disaster assistance? See instru | ctions | | N/A | 5b | | |
| | Org | anızatıo | ns relying on a current notice regarding disaster assistance, check h | ere | | ▶□□ | | | |
| C | If th | e answ | er is "Yes" to question 5a(4), does the foundation claim exemption fr | | _ | | | | |
| | exp | enditure | responsibility for the grant? | N | 1/A Y | es L No | | | |
| | | • | ch the statement required by Regulations section 53 4945-5(d) | | | | | ŀ | |
| 6a | | | ndation, during the year, receive any funds, directly or indirectly, to p | ay premiums on | | | | | |
| | | | penefit contract? | | Y | es 🗓 No | | | لببا |
| þ | | | ndation, during the year, pay premiums, directly or indirectly, on a po | ersonal benefit contract? | | } | 6b | | X, |
| | | | b, file Form 8870 | | <u> </u> | □ | | | |
| | | - | during the tax year, was the foundation a party to a prohibited tax sl | | Y | es X No | 71 | | |
| | | | the foundation receive any proceeds or have any net income attribu | | | N/A | 7b | | |
| 8 | | | lation subject to the section 4960 tax on payment(s) of more than \$ | 1,000,000 in remuneration or | | es X No | | | |
| Pa | rt V | | chute payment(s) during the year? Information About Officers, Directors, Truste | es Foundation Mai | | S A NO | | L | |
| | | | Paid Employees, and Contractors | | | | | | |
| 1 L | ist a | all offic | ers, directors, trustees, and foundation managers and th | eir compensation. | | | | | |
| | | | | (b) Title, and average | (c) Compensation | (d) Contributions to employee benefit plans and deferred | | (e) Exp ccount, | ense |
| | | | (a) Name and address | hours per week devoted to position | (If not paid, enter -0-) | and deferred compensation | a | allowai | nces |
| | | | | • | | | | | |
| | | | | | | | | | |
| SE | Έ | STA | rement 7 | | 0. | 0. | | | 0. |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | • | | | _ | | |
| | | | | | | | 1 | | |
| | | | | | | | | | |
| | | | | | | | + | | |
| | | | | | | | | | |
| | | | | | | | | | |
| 2 (| `om | nensa | tion of five highest-paid employees (other than those incl | uded on line 1). If none. | enter "NONE." | | | | |
| <u> </u> | | | | (b) Title, and average | | (d) Contributions to | \Box | (e) Exp | ense |
| | | (a) Nan | ne and address of each employee paid more than \$50,000 | hours per week devoted to position | (c) Compensation | employee benefit plans and deferred compensation | i a | ccount, allowar | other |
| | | NO | ONE | dovoted to position | | compensation | T | <u> </u> | |
| | | | | | | | | | |
| | | | - | | - | | 1 | | |
| | | | | | | | \perp | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | <u> </u> | | | | | |
| | | | | | <u></u> | | | | |
| [ota | ıl nu | mber o | other employees paid over \$50,000 | | | • | | | 0 |
| | | | | | | Forn | n 99 0 |)-PF | (2019) |

923551 12-17-19

| Form 990-PF (2019) DANIEL & PAMELLA DEVOS FOUNDATION | | 3035976 Page 7 |
|--|---------------------------------------|---------------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued) | on Managers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, enter | 'NONE." | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| RDV CORPORATION - 126 OTTAWA AVE STE 500, | | |
| GRAND RAPIDS, MI 49503 | MANAGEMENT FEE | 289,334. |
| | | |
| | | |
| | | |
| | | |
| 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 statistic number of organizations and other beneficiaries served, conferences convened, research papers produce. | cal information such as the ced, etc. | Expenses |
| 1 N/A | | |
| | | |
| 2 | | |
| 3 | | |
| | | |
| 4 | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year on lin | nes 1 and 2. | Amount |
| 1 N/A | | |
| | | |
| 2 | | |
| All other program-related investments See instructions. | | |
| 3 | | |
| | | |
| | | |
| Total. Add lines 1 through 3 | • | 0. |
| | | Form 990-PF (2019) |

| P | art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four | idations | s, see instructions) |
|---------|--|-----------|----------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes | | |
| · | | 1a | 0. |
| - b | Average of monthly cash balances | 1b | 690,188. |
| C | Fair market value of all other assets | 10 | 61,665. |
| d | Total (add lines 1a, b, and c) | 1d | 751,853. |
| е | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) 1e 0. | ll | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 751,853. |
| 4 | Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 11,278. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 740,575. |
| 6 | Minimum investment return Enter 5% of line 5 | 6 | 37,029. |
| P | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an foreign organizations, check here ▶ ☐ and do not complete this part) | d certain | 1 |
| 1 | Minimum investment return from Part X, line 6 | 1 | 37,029. |
| 2a | Tax on investment income for 2019 from Part VI, line 5 | - | 0,70231 |
| Za b | Income tax for 2019 (This does not include the tax from Part VI) | | |
| C | Add lines 2a and 2b | 2c | 41. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 36,988. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 36,988. |
| 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 | 36,988. |
| Ξ | art XII Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | <u> </u> | 10 471 142 |
| a | | 1a | 12,471,143. |
| b | Program-related investments - total from Part IX-B | 1b 2 | <u> </u> |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | | |
| 3 | Amounts set aside for specific charitable projects that satisfy the | 3a | |
| a | Suitability test (prior IRS approval required) | 3b | |
| b | Cash distribution test (attach the required schedule) Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 12,471,143. |
| 4 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | ┝┸ | 12,11,113 |
| 5 | income Enter 1% of Part I, line 27b | 5 | 41. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 12,471,102. |
| U | Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q 4940(e) reduction of tax in those years | | |

Form **990-PF** (2019)

Page 9

Part XIII Undistributed Income (see instructions)

| | (a) Corpus | (b) Years prior to 2018 | (c) 2018 ^ | (d) 2019 |
|--|---------------|---|---------------|---------------------|
| 1 Distributable amount for 2019 from Part XI, | | | | 26.000 |
| line 7 | | | | 36,988. |
| 2 Undistributed income, if any, as of the end of 2019 | | | | |
| a Enter amount for 2018 only | | | 0. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2019: | | • | | |
| a From 2014 4,596,447. | | | | |
| b From 2015 7, 276, 997. | | | | |
| c From 2016 11,043,423. | | | | |
| d From 2017 11,702,652. | | | | |
| e From 2018 14,061,744. | | | | } |
| t Total of lines 3a through c | 48,681,263. | | | |
| 4 Qualifying distributions for 2019 from | | - | | |
| Part XII, line 4: ►\$ 12,471,143. | | | | |
| a Applied to 2018, but not more than line 2a | | | 0. | |
| 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 2019 distributable amount | | | | 36,988. |
| e Remaining amount distributed out of corpus | 12,434,155. | | | 1 |
| 5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a)) | 0. | | - 111- | 0. |
| 6 Enter the net total of each column as indicated below: | | | | İ |
| & Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 61,115,418. | | | |
| 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 2018 Subtract line | | | | |
| 4a from line 2a. Taxable amount - see instr | | | 0. | |
| f Undistributed income for 2019 Subtract | | | | |
| lines 4d and 5 from line 1. This amount must | ļ | | | |
| be distributed in 2020 | | | | 0. |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) (Election | | | | |
| may be required - see instructions) | 0. | | | |
| 8 Excess distributions carryover from 2014 | 4 506 445 | | | |
| not applied on line 5 or line 7 | 4,596,447. | | | |
| 9 Excess distributions carryover to 2020. | EC E10 071 | | | |
| Subtract lines 7 and 8 from line 6a | 56,518,971. | | | |
| 10 Analysis of line 9: | | ļ | | ŀ |
| a Excess from 2015 b Excess from 2016 7,276,997. 11,043,423. | | İ | | |
| 44 500 650 | | | ļ | |
| 4 4 6 6 4 5 4 4 | | | | |
| | İ | | | |
| e Excess from 2019 [12,434,155.] | | | | - 000 PE (00 to |

923581 12-17-19

Form **990-PF** (2019)

| | & PAMELLA D | | | | 35976 Page 10 |
|---|--|--|--|---|--------------------|
| ¡Part∤XIV』 Private Operating F | oundations (see in | structions and Part VII | -A, question 9) | N/A | |
| 1 a If the foundation has received a ruling of | or determination letter that | t it is a private operating | | | |
| foundation, and the ruling is effective fo | or 2019, enter the date of t | the ruling | ▶ ∟_ | | |
| b Check box to indicate whether the foun | | ng foundation described i | | 4942(j)(3)_or <i>A</i> | 942(j)(5) · |
| 2 a Enter the lesser of the adjusted net | Tax year | W > 0040 | Prior 3 years | 1 1110014 | 4 |
| income from Part I or the minimum | (a) 2019 | (b) 2018 | (c) 2017 | (d) 2016 | (e) Total |
| investment return from Part X for | | | | | |
| each year listed | | | | | - |
| b 85% of line 2a | | | | _{ | |
| c Qualifying distributions from Part XII, | | | / | | |
| line 4, for each year listed | | | | | |
| d Amounts included in line 2c not | | | | | |
| used directly for active conduct of | | | | | |
| exempt activities | | | | | |
| e Qualifying distributions made directly | | / | | | |
| for active conduct of exempt activities | | | | | |
| Subtract line 2d from line 2c 3 Complete 3a, b, or c for the | | | | | |
| alternative test relied upon: | | | | | |
| a "Assets" alternative test - enter: | | | | | |
| (1) Value of all assets | | <u> </u> | L . | - | <u></u> |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test - enter | | | | | |
| 2/3 of minimum investment return shown in Part X, line 6, for each year listed | | | | | |
| c "Support" alternative test - enter. | 1 | | | | |
| (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (seption 512(a)(5)), or royalties) | | | | | |
| (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from | | _ | | | |
| an exempt organization | | | | | |
| (4) Gross investment income | | | | | |
| Part XV Supplementary Info | rmation (Comple | te this part only i | f the foundation | n had \$5,000 or mo | re in assets |
| at any time during t | he year-see instr | uctions.) | | | |
| 1 Information Regarding Foundation | | | | | , |
| a List any managers of the foundation where year (but only if they have contributed in the contributed in | no have contributed more more than \$5,000) (See s | than 2% of the total contr ection 507(d)(2).) | ributions received by th | e foundation before the clos | se of any tax |
| SEE STATEMENT 8 | | | | · | |
| b List any managers of the foundation wh | | | or an equally large por | tion of the ownership of a pa | artnership or |
| other entity) of which the foundation ha | is a 10% or greater interes | st. | | | |
| NONE | | | | | |
| 2 Information Regarding Contribut Check here ▶ If the foundation of the foundation makes gifts, grants, etc. | only makes contributions | to preselected charitable | organizations and does | not accept unsolicited requals, b. c. and d | ests for funds. If |
| a The name, address, and telephone num | | | | | |
| DANIEL & PAMELLA DEV | OS, (616) 64 | 43-4700 | | | |
| P.O. BOX 230257, GRA | | | | J, MI 43363 | |
| b The form in which applications should I DETAILS AVAILABLE AT | | | iodia include, | | |
| c Any submission deadlines; | | | | | |
| d Any restrictions or limitations on award | s, such as by geographica | al areas, charitable fields, | kınds of institutions, o | r other factors: | |
| NONE | | | | | |

| Part XV Supplementary Information | | | | , |
|--|--|----------------------|----------------------------------|--|
| 3 Grants and Contributions Paid During the Ye | ear or Approved for Future P | Payment | | |
| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of | Purpose of grant or contribution | Amount |
| | or substantial contributor | recipient | | |
| a Paid during the year | | | | 1 |
| | | | | |
| | | | | |
| | | 1 | | |
| SEE ATTACHED STATEMENT 11 | | | | 12,141,000. |
| | | <u> </u> | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | • | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | <u> </u> | _ | | |
| Total | | | ▶ 3a | 12,141,000. |
| b Approved for future payment | | | | |
| | | | | |
| | | | | |
| | | | | |
| SEE ATTACHED STATEMENT 10 | | | | 2,525,000. |
| | | | | 2,323,000. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3b | 2,525,000. orm 990-PF (2019) |
| | | | F | orm 990-PF (2019) |

| Part XVI-A | Analysis of Income-Producing | Activities |
|------------|------------------------------|------------|

| Enter gross amounts unless atherwise indicated | Unrelated business income Excluded by section 512, 513, or 514 | | (4) | | |
|---|--|---------------------------------------|--|--------------------------------|---------------------------------------|
| Enter gross amounts unless otherwise indicated | (a) Business | (b) Amount | (C) Exclu- sion code | | (e) Related or exempt function income |
| 1 Program service revenue: | code | - | Code | | |
| <u>a</u> | | | <u> </u> | | |
| b | | | | <u> </u> | |
| <u> </u> | | | | | |
| d | | | | | |
| e | | | | | |
| f | | | | | |
| g Fees and contracts from government agencies | | | - | | |
| 2 Membership dues and assessments | | | ├ | | |
| 3 Interest on savings and temporary cash | | | 14 | 2 405 | |
| investments | | | 14 | 2,485. | |
| 4 Dividends and interest from securities | | | | ļ | |
| 5 Net rental income or (loss) from real estate: | | <u> </u> | | | |
| a Debt-financed property | | | ļ | | |
| b Not debt-financed property | <u> </u> | | - | | |
| 6 Net rental income or (loss) from personal | | | 1 | | |
| property | | | 1 4 | 1 000 | |
| 7 Other investment income | | | 14 | 1,228. | |
| 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 | <u> </u> | | - | | |
| e | | | | 2 712 | |
| 12 Subtotal. Add columns (b), (d), and (e) | | 0. | | 3,713. | |
| 13 Total Add line 12, columns (b), (d), and (e) | | | | 13 | 3,713. |
| (See worksheet in line 13 instructions to verify calculations.) | | | | | |
| Part XVI-B Relationship of Activities to | the Acco | mplishment of Exe | empt | Purposes | |
| Line No Explain below how each activity for which incor | ne is reported i | in column (e) of Part XVI-A | contrib | outed importantly to the accom | polishment of |
| the foundation's exempt purposes (other than b | | | 0011111 | otos importantiy to the decen | phomone or |
| · · · · · · · · · · · · · · · · · · · | | , , | | | |
| | | , | | , | |
| | | | | | |
| | | | | | |
| | | · · · · · · · · · · · · · · · · · · · | | | |
| | | • | | | |
| | | | | | |
| | | | | | |
| · · | | | | • | |
| | - | | | | - |
| | | | | | |
| | | | | | |
| | | | | | |
| " | | | | | |
| | - | | | <u></u> | |
| | | - | | | |
| | | · - . | | | |
| | | | | | |
| | | | _ | | |
| | | ~_ | _ | | |

923621 12-17-19

| Form 990-F Part X | | | | 38 - nd Relationships With Non | -3035976 charitable | Page 1 |
|-----------------------------|----------------------------------|--|----------------------------------|---|---------------------------------------|----------|
| 1 Did th | . | rectly engage in any of the follow | wing with any other organization | in described in section 501(c) | | Yes No |
| | • | nizations) or in section 527, relat | | in described in section 50 No. | | |
| | | ation to a noncharitable exempt | | | | |
| (1) | • | | •·· g •···· | | 1a(1) | X |
| | Other assets | | | | 1a(2) | X |
| | transactions; | | | | | |
| | Sales of assets to a noncharital | ble exempt organization | | | 1b(1) | X |
| ٠,, | | ncharitable exempt organization | ſ | | 1b(2) | Х |
| ٠, | Rental of facilities, equipment, | , <u> </u> | | | 1b(3) | Х |
| ٠, | Reimbursement arrangements | | | | 1b(4) | Х |
| | oans or loan guarantees | | | | 1b(5) | X |
| • • | | mbership or fundraising solicita | itions | | 1b(6) | X |
| c Sharı | ng of facilities, equipment, ma | uling lists, other assets, or paid | employees | | 1c | X |
| d If the | answer to any of the above is | "Yes," complete the following so | chedule Column (b) should alv | ways show the fair market value of the | goods, other asse | ets, |
| or se | rvices given by the reporting fo | oundation. If the foundation reci | eived less than fair market valu | e in any transaction or sharing arrange | ement, show in | |
| colun | nn (d) the value of the goods, | other assets, or services receive | ed. | | | |
| (a) Line no | (b) Amount involved | | able exempt organization | (d) Description of transfers, transacti | ons, and sharing arra | ngements |
| | | N/A | 1 | | | |
| | | | | | | |
| | | | | | | |
| | | | | | <u></u> | |
| | | | - <u></u> - | | | |
| | | <u> </u> | | | | |
| | | <u>. </u> | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | - | | |
| | | | | | | |
| | <u> </u> | | | · | | |
| | | | | | | |
| | | | | | | |
| 0- 1-45- | formedation dispaths or individu | the offiliated with or related to a | and or more toy exempt ergeni | zations described | · | |
| | • | tly affiliated with, or related to, on 501(c)(3)) or in section 527? | one of more tax-exempt organiz | zations described | Yes | X No |
| | s," complete the following sch | | | | 103 | |
| <u> </u> | (a) Name of org | | (b) Type of organization | (c) Description of | relationship | |
| | N/A | | (4) | | · · · · · · · · · · · · · · · · · · · | |
| | | - . | | | | |
| | | | | | | |
| | | | | | | |
| | - | | | | | |
| | | | | atements, and to the best of my knowledge | May the IRS d | |
| Sign Here | DAMBan | | 111-2020 | tion of which preparer has any knowledge | return with the shown below? | preparer |
| | Signature of officer or trustee | | Date s signature | Title Check if | PTIN | |

Phone no. 616-336-7900 Form **990-PF** (2019)

P01585004

Firm's EIN ► 86-1065772

Paid

Preparer

Use Only

self- employed

10/21/20

KRISTINA WOZNIAK

Firm's name ► DELOITTE TAX LLP

Firm's address ▶ 38 COMMERCE SW, SUITE 600

GRAND RAPIDS, MI 49503

Schedule B

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

Department of the Treasury Internal Revenue Service

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

Name of the organization

DANIEL & PAMELLA DEVOS FOUNDATION

38-3035976

Organization type (check one)

| Filers of: | : | Section: | | |
|--------------------------------------|--|---|--|--|
| Form 990 | 0 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 | X 501(c)(3) exempt private foundation | | |
| | | 4947(a)(1) nonexempt charitable trust treated as a private foundation | | |
| 501(c)(3) taxable private foundation | | | | |
| | • • | s covered by the General Rule or a Special Rule . (7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions | | |
| General | Rule | | | |
| X | • | n filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor Complete Parts I and II See instructions for determining a contributor's total contributions | | |
| Special l | Rules | | | |
| | sections 509(a)(1) a any one contributor | n described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under 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 or, 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 1, line 1 Complete Parts I and II | | |
| | year, total contribut | n described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the utions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the lity to children or animals Complete Parts I, II, and III | | |
| | year, contributions is checked, enter he purpose Don't com | n described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the section experience of the contributions to taled more than \$1,000. If this box here the total contributions that were received during the year for an exclusively religious, charitable, etc, implete any of the parts unless the General Rule applies to this organization because it received nonexclusively e, etc, contributions totaling \$5,000 or more during the year. | | |
| | | nat isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), 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 | | |

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)

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2019)

Name of organization

Employer identification number

DANIEL & PAMELLA DEVOS FOUNDATION

38-3035976

| Part I | Contributors (see instructions) Use duplicate copies of Part I if additional space is needed | | | | | | |
|------------|--|----------------------------|---|--|--|--|--|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 1 | DANIEL AND PAMELLA DEVOS 126 OTTAWA AVE. NW, SUITE 500 GRAND RAPIDS, MI 49503 | \$ <u>27,325,000.</u> | Person X Payroll | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Noncash (Complete Part II for noncash contributions) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Oncash Complete Part II for noncash contributions) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Oncash Complete Part II for noncash contributions) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Oncash (Complete Part II for noncash contributions) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Payroll Payroll Part II for noncash contributions) | | | | |

Name of organization

Employer identification number

DANIEL & PAMELLA DEVOS FOUNDATION

38-3035976

| art II N | oncash Property (see instructions) Use duplicate copies of Pa | rt II if additional space is needed | |
|------------------------------|---|--|----------------------------|
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received |
| | | <u> </u> | |
| - | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received |
| _ | | | |
| | | | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received |
| | | | |
| | | | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received |
| = | | | |
| | | | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received |
| | | | |
| | | | |
| (a) No. from | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received |
| | | | |
| _ _ | | \$ | |
| 453 11-06-19 | | | 990, 990-EZ, or 990-PF) (2 |

Name of organization Employer identification number DANIEL & PAMELLA DEVOS FOUNDATION 38-3035976 Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info once.) Use duplicate copies of Part III if additional space is needed (a) No. from Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from Part I (c) Use of gift (d) Description of how gift is held (b) Purpose of gift (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (c) Use of gift (d) Description of how gift is held (b) Purpose of gift Part I (e) Transfer of gift Relationship of transferor to transferee Transferee's name, address, and ZIP + 4 (a) No. from Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

| FORM 990-PF INTEREST ON SAVI | NGS AND TE | MPORARY | CASH : | INVESTMENTS | STATEMENT 1 |
|--|------------------------------|--------------------------|---------------|-----------------------------------|-------------------------------|
| SOURCE | REVI | A) ENUE BOOKS | | (B) INVESTMENT INCOME | (C) ADJUSTED NET INCOME |
| MACATAWA BANK | | 2,485. | - | 2,473. | |
| TOTAL TO PART I, LINE 3 | | 2,485. | | 2,473. | |
| FORM 990-PF | OTHÈR I | INCOME | | | STATEMENT 2 |
| DESCRIPTION | | (A) REVENU PER BOO | | (B) NET INVEST- MENT INCOME | |
| FROM PARTNERSHIPS - SEE STATE FROM PARTNERSHIPS PER BOOKS | MENT 9 | 1 | 0. L,228. | 1,288. | |
| TOTAL TO FORM 990-PF, PART I, | LINE 11 | 1 | L,228. | 1,288. | , |
| FORM 990-PF | ACCOUNT | ING FEES | 3 | | STATEMENT 3 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | NET IN | | (C) ADJUSTED NET INCOME | CHARITABLE |
| ACCOUNTING | 460 | • | 46 | • | 414. |
| TO FORM 990-PF, PG 1, LN 16B | 460 | • | 46 | • | 414. |
| FORM 990-PF C | THER PROFES | SSIONAL | FEES | | STATEMENT 4 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | NET IN | | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| MANAGEMENT FEES CUSTODIAL FEES - TNT OTHER PROFESSIONAL FEES | 289,334 188 38,558 | • | 234 0 0 | • | 289,100. 188. 38,558. |
| TO FORM 990-PF, PG 1, LN 16C | 328,080 | | 234 | _ | 327,846 |
| | | <u> </u> | | <u> </u> | |

| FORM 990-PF | OTHER E | XPENSES | S | TATEMENT 5 |
|---|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| POSTAGE MISCELLANEOUS STATIONERY SUPPLIES | 53. 101. 498. | 0. 0. 0. | | 53. 101. 498. |
| TO FORM 990-PF, PG 1, LN 23 | 652. | 0. | | 652. |

| FORM 990-PF OTHER | INVESTMENTS | | STATEMENT 6 |
|--|---------------------|------------|----------------------|
| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
| FREEDOM CAPITAL MANAGEMENT LIMITED PARTNERSHIP | FMV | 31,843. | 31,843. |
| TOTAL TO FORM 990-PF, PART II, LINE | 13 | 31,843. | 31,843. |

| FORM 990-PF PART VIII - LIST TRUSTEES AND I | OF OFFICERS, DI FOUNDATION MANAG | | STAT | EMENT 7 |
|--|-------------------------------------|-------------------|---------------------------------|---------|
| NAME AND ADDRESS | TITLE AND AVRG HRS/WK | | EMPLOYEE BEN PLAN CONTRIB | |
| DANIEL G. DEVOS 126 OTTAWA AVENUE, N.W., SUITE 500 GRAND RAPIDS, MI 49503 | PRESIDENT 1.00 | 0. | 0. | 0. |
| PAMELLA DEVOS 126 OTTAWA AVENUE, N.W., SUITE 500 GRAND RAPIDS, MI 49503 | VICE PRESIDENT | 0. | 0. | 0. |
| JERRY L. TUBERGEN 126 OTTAWA AVENUE, N.W., SUITE 500 GRAND RAPIDS, MI 49503 | | PRESIDENT 0. | 0. | 0. |
| ROBERT H. SCHIERBEEK 126 OTTAWA AVENUE, N.W., SUITE 500 GRAND RAPIDS, MI 49503 | | R/SECRETARY 0. | | 0. |
| JEFFREY S. BOWERMAN 126 OTTAWA AVENUE, N.W., SUITE 500 GRAND RAPIDS, MI 49503 | VP OF TAX/ASSIS | TANT SECRET | | 0. |
| TOTALS INCLUDED ON 990-PF, PAGE 6, | PART VIII | 0. | 0. | 0. |

| FORM 990-PF | | PART XV - LINE 1A | STATEMENT 8 |
|-------------|---|-----------------------------|-------------|
| | • | LIST OF FOUNDATION MANAGERS | |

NAME OF MANAGER

DANIEL G. DEVOS PAMELLA DEVOS

EIN: 38-3035976 December 31, 2019

Form 990PF - Part I, Line 11 Column (b) Income/(Loss) from Partnerships

| Partnership Name | Freedom Capital Management LP |
|--|----------------------------------|
| EIN | 20-0561124 |
| Passive ordinary business income/loss Nonpassive ordinary business income/loss Net rental real estate income/loss Other net rental income/loss Guaranteed payments | |
| Interest Income Non-qualified Dividends Qualified Dividends Royalties | 1,321 42 - |
| Net short-term capital gain/loss Net long-term capital gain/loss Net section 1231 gain/loss Other portfolio income/loss Section 1256 contracts & straddles Other income/loss | (124) |
| Section 179 deduction Contributions Investment interest expense | 1,239 |
| Section 59(e)(2) expenditures Deductions - portfolio (2% floor) Deductions - portfolio (other) Other deductions-SBT/State and Local Other deductions-Property Taxes Other deductions-Miscellaneous Foreign taxes paid Foreign taxes accrued | 75 |
| Total Partnership Income/(Loss) | 1,164 |
| Amount Reported on Form 990-PF, Part I, Line 11 Amount Reported on Form 990-PF, Part IV, Line 1 Amount Reported on Form 990-T as UBTI | 1,288 (124) - |
| Total Partnership Income/(Loss) | 1,164 |

Year Ended 12/31/2019

Form 990PF - Part XV Supplementary Information Line 3b - Grants and Contributions Approved for Future Payment

| Recipient Name & Address | Relationship to Donor | Foundation Status of Recipient | Purpose of Grant | Amount |
|--|--------------------------|--------------------------------------|--|-----------|
| 70X7 Life Recovery 97 W 22nd St Holland, MI 49423 | None | PC | Unrestricted Grant to General Fund | 60,000 |
| Degage Ministries 144 Division Ave S Grand Rapids, MI 49503 | None | PC | Unrestricted Grant to General Fund | 50,000 |
| Festival of the Arts in Grand Rapids P O Box 68440 Grand Rapids, MI 49516-8440 | None | PC | Unrestricted Grant to General Fund | 30,000 |
| Grand Rapids Whitewater 120 Lyon St NW Grand Rapids, MI 49503 | None | PC | Unrestricted Grant to General Fund | 500,000 |
| Great Lakes Center for the Arts 800 Bay Harbor Drive Bay Harbor, MI 49770 | None | PC | Unrestricted Grant to General Fund | 1,300,000 |
| KeyStone Community Church 655 Spaulding Ave Ada, MI 49301 | None | PC | Unrestricted Grant to General Fund | 75,000 |
| Orlando Magic Youth Foundation Inc. 8701 Maitland Summit Blvd Orlando, FL 32810 | None | PC | Unrestricted Grant to General Fund | 180,000 |
| Streams of Hope 60th Street SE Grand Rapids, MI 49548 | None | PC | Unrestricted Grant to General Fund | 5,000 |
| West Michigan Aviation Academy 5363 44th Street SE Grand Rapids, MI 49512 | None | PC | Unrestricted Grant to General Fund | 315,000 |
| West Michigan Sports Commission 171 Monroe Avenue NW, Suite 545 Grand Rapids, MI 49503 | None | PC | Unrestricted Grant to General Fund | 10,000 |
| Grand Total | | | | 2,525,000 |

Year Ended 12/31/2019

| Recipient Name & Address | Relationship to Donor | Foundation Status of Recipient | Purpose of Grant | Amount |
|--|--------------------------|--------------------------------------|--------------------------|---------|
| | | | | |
| 70X7 Life Recovery | None | PC | Unrestricted | 30,000 |
| 97 W 22nd St | | | Grant to | |
| Holland, MI 49423 | | | General Fund | |
| Ada Township | None | GOV | Unrestricted | 315,000 |
| PO Box 370 | | | Grant to | |
| Ada, MI 49301 | | | General Fund | |
| American Cancer Society Inc. | None | PC | Unrestricted | 1,000 |
| 20450 Civic Center Dr | 110110 | . • | Grant to | ., |
| Southfield, MI 48076 | | | General Fund | |
| Addish Counting Together Inc | None | PC | Unrestricted | 10,000 |
| Artists Creating Together Inc. | None | FC | Grant to | 10,000 |
| 1140 Monroe Ave NW, Ste 4101 | | | Grant to General Fund | |
| Grand Rapids, MI 49503-1072 | | | General Fund | |
| ArtPrize Grand Rapids | None | PC | Unrestricted | 50,000 |
| 41 Sheldon Blvd SE | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Auditorium Theatre Of Roosevelt University Inc | None | PC | Unrestricted | 1,500 |
| 50 E Ida B Wells Dr at Roosevelt University | | | Grant to | |
| Chicago, IL 60605-1290 | | | General Fund | |
| Baxter Community Center | None | PC | Unrestricted | 5,000 |
| 935 Baxter Street SE | | | Grant to | |
| Grand Rapids, MI 49506 | | | General Fund | |
| Bay Harbor Foundation | None | PC | Unrestricted | 10,000 |
| 750 Bay Harbor Dr | | | Grant to | |
| Bay Harbor, MI 49770 | | | General Fund | |
| Bethany Christian Services, Inc. | None | PC | Unrestricted | 40,000 |
| 901 Eastern Avenue NE | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Cape Eleuthera Foundation | None | PC | Unrestricted | 85,000 |
| P O Box 842484 | | | Grant to | , |
| Boston, MA 02284-2484 | | | General Fund | |
| Child and Family Services of Northwestern | None | PC | Unrestricted | 50,000 |
| Michigan, Inc. | .,,,,,, | . 5 | Grant to | 25,550 |
| 3785Veterans Drive | | | General Fund | |
| Traverse City, MI 49684-4516 | | | | |
| Crooked Tree Arts Council, Inc. | None | PC | Unrestricted | 50,000 |
| 461 E Mitchell Street | | | Grant to | , |
| Petoskey, MI 49770 | | | General Fund | |
| Davenport University | None | PC | Unrestricted | 58,500 |
| Office of Alumni and Advancement | HONG | | Grant to | 55,550 |
| 6191 Kraft Ave SE | | | General Fund | |
| Grand Rapids, MI 49512 | | | | |
| Crana Napido, IIII 10012 | | | | |

Year Ended 12/31/2019

| Recipient Name & Address | Relationship to Donor | Foundation Status of Recipient | Purpose of Grant | Amount |
|--|--------------------------|--------------------------------------|--|--------|
| David's House Ministries 2375 Banner Drive SW | None | PC | Unrestricted Grant to | 1,500 |
| Wyoming, MI 49509 | | | General Fund | |
| Detroit Symphony Orchestra Hall, Inc. 3711 Woodward Ave Detroit , MI 48201 | None | PC | Unrestricted Grant to General Fund | 5,000 |
| Dutch American Council 3755 36th St. SE, Suite 300 Grand Rapids, MI 49512 | None | PC | Unrestricted Grant to General Fund | 2,500 |
| Elton John Aids Foundation Inc. 584 Broadway, Suite 906 New York, NY 10012 | None | PC | Unrestricted Grant to General Fund | 7,000 |
| Evergreen Commons, Inc. 480 State Street Holland, MI 49423 | None | PC | Unrestricted Grant to General Fund | 25,000 |
| Eversight Illinois 547 W Jackson Blvd , Ste 600 Chicago, IL 60661-5734 | None | PC | Unrestricted Grant to General Fund | 1,000 |
| Faith Hospice 2100 Raybrook St SE, Ste 300 Grand Rapids, MI 49546-5783 | None | PC | Unrestricted Grant to General Fund | 1,000 |
| Family Outreach Center 1939 South Division SE Grand Rapids, MI 49507 | None | PC | Unrestricted Grant to General Fund | 15,000 |
| Father Fred Foundation P O Box 2260 Traverse City, MI 49685 | None | PC | Unrestricted Grant to General Fund | 37,500 |
| Ferris State University 1301 South State St , IRC 131 Big Rapids, MI 49307 | None | PC | Unrestricted Grant to General Fund | 51,000 |
| Festival of the Arts in Grand Rapids P O Box 68440 Grand Rapids, MI 49516-8440 | None | PC | Unrestricted Grant to General Fund | 15,000 |
| Fishtown Preservation Society, Inc. 203 E Cedar Street P O Box 721 Leland, MI 49654 | None | PC | Unrestricted Grant to General Fund | 10,000 |
| Friends of Grand Rapids Parks P O Box 3199 Grand Rapids, MI 49501 | None | PC | Unrestricted Grant to General Fund | 5,000 |

Year Ended 12/31/2019

| | Relationship | Foundation Status of | Purpose | |
|---|--------------|-------------------------|--------------|-----------|
| Recipient Name & Address | to Donor | Recipient | of Grant | Amount |
| George W Bush Foundation | None | PC | Unrestricted | 500,000 |
| P O Box 600610 | | | Grant to | |
| Dallas, TX 75206 | | | General Fund | |
| Grand Rapids Art Museum | None | PC | Unrestricted | 325,000 |
| 101 Monroe Center Street NW | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Grand Rapids Christian Schools | None | PC | Unrestricted | 500 |
| 2400 Plymouth Ave SE | | | Grant to | |
| Grand Rapids, MI 49506 | | | General Fund | |
| Grand Rapids Community College Foundation | None | PC | Unrestricted | 100,000 |
| 143 Bostwick Avenue NE | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Grand Rapids Initiative for Leaders | None | PC | Unrestricted | 15,000 |
| PO Box 7865 | | | Grant to | |
| Grand Rapids, MI 49510 | | | General Fund | |
| Grand Rapids Symphony Society | None | PC | Unrestricted | 575,000 |
| 300 Ottawa NW Suite 100 | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Grand Valley State University | None | PC | Unrestricted | 2,312,000 |
| 301 Fulton Street West, P O Box 2005 | | | Grant to | |
| Grand Rapids, MI 49501-1945 | | | General Fund | |
| Great Lakes Center for the Arts | None | PC | Unrestricted | 150,000 |
| 800 Bay Harbor Drive | | | Grant to | |
| Bay Harbor, MI 49770 | | | General Fund | |
| Greater Flint Health Coalition Inc. | None | PC | Unrestricted | 75,000 |
| 519 S Saginaw St , Ste 306 | | | Grant to | |
| Flint, MI 48502-1815 | | | General Fund | |
| Greater Michigan Council Inc. | None | PC | Unrestricted | 90,000 |
| 3213 Walker Ave NW | | | Grant to | |
| Grand Rapids, MI 49544 | | | General Fund | |
| Guiding Light Mission Inc. | None | PC | Unrestricted | 5,000 |
| 255 S Division | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Harbor Hall Foundation | None | PC | Unrestricted | 5,000 |
| P O Box 376 | | | Grant to | |
| Harbor Springs, MI 49740 | | | General Fund | |
| Harbor Springs Area Historical Society | None | PC | Unrestricted | 50,000 |
| P O Box 812 | | | Grant to | |
| 349 E Main St | | | General Fund | |
| Harbor Springs, MI 49740 | | | | |

Year Ended 12/31/2019

| Decision Alberta | Relationship | Foundation Status of | Purpose | A |
|---|--------------|-------------------------|--------------------------|---------|
| Recipient Name & Address | to Donor | Recipient PC | of Grant | Amount |
| Heart of West Michigan United Way | None | PC | Unrestricted Grant to | 125,000 |
| 118 Commerce Ave SW, Suite 100 | | | General Fund | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Hope Network | None | PC | Unrestricted | 55,000 |
| 3075 Orchard Vista SE, P O Box 890 | | | Grant to | |
| Grand Rapids, MI 49518-0890 | ŀ | | General Fund | |
| I Understand Love Heals | None | PC | Unrestricted | 10,000 |
| P O Box 822 | | | Grant to | ,5,555 |
| Ada, MI 49301 | | | General Fund | |
| | Maria | DO. | t la sa ata ata d | 650,000 |
| John F Kennedy Center For The Performing Arts | None | PC | Unrestricted | 650,000 |
| P O Box 101510 | | | Grant to | |
| Arlington, VA 22210 | | | General Fund | |
| Kent County Parks Foundation | None | PC | Unrestricted | 10,000 |
| P O Box 230165 | | | Grant to | ^ |
| Grand Rapids, MI 49523 | | | General Fund | |
| KeyStone Community Church | None | PC | Unrestricted | 225,000 |
| 655 Spaulding Ave | | | Grant to | , |
| Ada, MI 49301 | | | General Fund | |
| Kids Food Basket 2055 Oak Industrial Drive NE, Suite C | None | PC | Unrestricted Grant to | 50,000 |
| Grand Rapids, MI 49505 | | | General Fund | |
| Lake Michigan Junior Golf Association Inc. | None | PC | Unrestricted | 2,500 |
| 2715 Leonard St NW | | | Grant to | • |
| Grand Rapids, MI 49504 | | | General Fund | |
| Les Cheneaux School | None | PC | Unrestricted | 2,500 |
| P O Box 26 | 110110 | . 0 | Grant to | 2,000 |
| Hessel, MI 49745-0026 | | | General Fund | |
| Maskinsa Cantan | None | PC | Unrestricted | 150,000 |
| Mackinac Center 140 West Main Street | None | PC | Grant to | 150,000 |
| P O Box 568 | | | General Fund | |
| Midland, MI 48640-0568 | | | Ochiciai i and | |
| | N1 | DO | () and the stant | 5 000 |
| Make-A-Wish Foundation of Michigan | None | PC | Unrestricted Grant to | 5,000 |
| 648 Monroe Ave NW, Suite 104 | | | General Fund | |
| Grand Rapids, MI 49503 | | | General Fullu | |
| Marygrove College | None | PC | Unrestricted | 1,000 |
| 8425 W McNichols Rd | | | Grant to | |
| Detroit, MI 48821-2546 | | | General Fund | |
| McLaren Northern Michigan | None | PC | Unrestricted | 85,000 |
| 360 Connable Avenue | | | Grant to | |
| Petoskey, MI 49770 | | | General Fund | |

Year Ended 12/31/2019

| Recipient Name & Address | Relationship to Donor | Foundation Status of Recipient | Purpose of Grant | Amount |
|--|--------------------------|--------------------------------------|--------------------------|-----------|
| Next Step Of West Michigan | None | PC | Unrestricted | 15,000 |
| 100 Garden Street SE | None | . 0 | Grant to | 10,000 |
| Grand Rapids, MI 49507 | | ı | General Fund | |
| Northwood University | None | PC | Unrestricted | 1,382,500 |
| 4000 Whiting Dr | | | Grant to | |
| Midland, MI 48640 | | | General Fund | |
| Orlando Magic Youth Foundation Inc. | None | PC | Unrestricted | 95,000 |
| 8701 Maitland Summit Blvd | | | Grant to | |
| Orlando, FL 32810 | | | General Fund | |
| Parkinsons Association of West Michigan Inc. | None | PC | Unrestricted | 1,000 |
| 260 Jefferson Ave SE, Suite 210 | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Saint Mary's Foundation | None | PC | Unrestricted | 120,000 |
| 200 Jefferson Ave SE | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Speaks Out Foundation | None | PC | Unrestricted | 510,000 |
| 555 3 Mile Road NW | | | Grant to | |
| Grand Rapids, MI 49544 | | | General Fund | |
| Spectrum Health Foundation | None | PC | Unrestricted | 30,000 |
| 100 Michigan NE - MC 4 | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| St Cecilia Music Society | None | PC | Unrestricted | 15,000 |
| 24 Ransom Ave NE | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |
| Streams of Hope | None | PC | Unrestricted | 5,000 |
| 60th Street SE | | | Grant to | |
| Grand Rapids, MI 49548 | | | General Fund | |
| The Joffrey Ballet | None | PC | Unrestricted | 325,000 |
| Joffrey Tower | | | Grant to | |
| 10 E Randolph St Chicago, IL 60601 | | | General Fund | |
| Chicago, IL 60601 | | | | |
| The RonaNorthern Michigan University Foundation | None | PC | Unrestricted | 20,000 |
| 603 Presque Isle Ave | | | Grant to General Fund | |
| Marquette, MI 49855 | | | General Fund | |
| The Ronald McDonald House of Western Michigan Inc. | None | PC | Unrestricted | 10,000 |
| 1323 Cedar St. NE | | | Grant to | |
| Grand Rapids, MI 49503-1326 | | | General Fund | |
| Van Andel Research Institute | None | PC | Unrestricted | 1,000 |
| 333 Bostwick NE | | | Grant to | |
| Grand Rapids, MI 49503 | | | General Fund | |

Year Ended 12/31/2019

| Recipient Name & Address | Relationship to Donor | Foundation Status of Recipient | Purpose of Grant | Amount |
|--|--------------------------|--------------------------------------|--|------------|
| West Michigan Aviation Academy 5363 44th Street SE Grand Rapids, MI 49512 | None | GOV | Unrestricted Grant to General Fund | 15,000 |
| West Michigan Hockey Youth Foundation Inc. 130 W Fulton Grand Rapids, MI 49503 | None | PC | Unrestricted Grant to General Fund | 37,000 |
| West Michigan Horticultural Society Inc. 1000 East Beltline Avenue NE Grand Rapids, MI 49525 | None | PC | Unrestricted Grant to General Fund | 263,500 |
| West Michigan Sports Commission 171 Monroe Avenue NW, Suite 545 Grand Rapids, MI 49503 | None | PC | Unrestricted Grant to General Fund | 5,000 |
| Whitney Museum of American Art 99 Gansevoort St New York, NY 10014 | None | PC | Unrestricted Grant to General Fund | 2,600,000 |
| Whole Child International 2444 Wilshire Boulevard, Suite 285 Santa Monica, CA 90403 | None | PC | Unrestricted Grant to General Fund | 200,000 |
| Young Life 3347 East Beltline Ave NE Grand Rapids, MI 49525 | None | PC | Unrestricted Grant to General Fund | 35,000 |
| Total | | | | 12,141,000 |