Sport 990-PF
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

2019

	For	caler	ndar year 2019 or tax year beginning		, and ending		
			foundation			A Employer identification	number
	Т	ΉE	W S AND LOIS VANDALSON	FOUNDATION		38-3607246	
	Nur	nber a	and street (or P O box number if mail is not delivered to stree	t address)	Room/suite	B Telephone number	
	_2	34	7 WEST DOWLING ROAD			269 623 85	33
			own, state or province, country, and ZIP or foreign p	postal code		C If exemption application is p	ending, check here
			TON, MI 49046				
	G (Check	all that apply: Initial return	Initial return of a fo	rmer public charity	D 1 Foreign organizations	s, check here
03			Einal return	Amended return		Foreign organizations me check here and attach co	eting the 85% test
Z	H (hack	Address change type of organization: X Section 501(c)(3) e	Name change		1	· · · · · · · · · · · · · · · · · · ·
OW	۳,	_	ection 4947(a)(1) nonexempt charitable trust	Other taxable private founda	tion ()	E If private foundation sta under section 507(b)(1)	
	l Fá			ing method: X Cash	Accrual	F If the foundation is in a	
				ther (specify)		under section 507(b)(1)	
	<u> </u>	\$	13,387,216. (Part I, colur	nn (d), must be on cash bası	s.)		
	Pa	art I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
		,	necessarily equal the amounts in column (a))	expenses per books	income	income	(cash basis only)
		1	Contributions, gifts, grants, etc., received			N/A	
		2	Check \(\bigcup \bigc				
		3	Interest on savings and temporary cash investments	252,649.	252,649.		STATEMENT 1
		4	Dividends and interest from securities Gross rents	232,043.	232,043.	· · · · · · · · · · · · · · · · · · ·	DIAIEMENI I
		"."	Net rental income or (loss)				
	-	62	Net gain or (loss) from sale of assets not on line 10	101,465.		,	
	Revenue	Ь	Gross sales price for all assets on line 6a 2,836,233.				
	eve	7	Capital gain net income (from Part IV, line 2)		101,465.	REC	FIVED
	Œ	8	Net short-term capital gain		<u> </u>	N	- VLD
		9	Income modifications Gross sales less returns			MAY 1	1 2020
		10a	and allowances				1 2020 01
		J	Less Cost of goods sold		4-4	LOGDE	الثما ، ـــا
			Gross profit or (loss)			CODE	N, UT
2020		11 12	Other income Total Add lines 1 through 11	354,114.	354,114.		
	_	13	Compensation of officers, directors, trustees, etc	6,000.	3,000.		3,000.
2 5		14	Other employee salaries and wages				
>		15	Pension plans, employee benefits				
	ses	16a	Legal fees STMT 2	3,514.	1,757.		1,757.
	Expense		Accounting fees STMT 3	1,300.	<u> </u>		650.
SCANNED NO		l .	Other professional fees STMT 4	51,095.	<u>51,095.</u>		0.
Ž	tive	17	Interest	10 010	4 044		
Ş	stra	18 19	Taxes STMT 5 Depreciation and depletion	10,010.	4,944.		0.
Ş	i <u>r</u>	20	Occupancy				<u> </u>
O	Adn	21	Travel, conferences, and meetings		 		
	P	22	Printing and publications				
	Operating and Administrative	23	Other expenses STMT 6	1,345.	0.		1,345.
	atir	ı	Total operating and administrative				
	þer	l	expenses Add lines 13 through 23	73,264.	61,446.		6,752.
	0	ı	Contributions, gifts, grants paid	600,000.			600,000.
		26	Total expenses and disbursements	670.05	<i></i>		606
			Add lines 24 and 25	673,264.	61,446.		606,752.
		1	Subtract line 26 from line 12:	310 150			
		l	Excess of revenue over expenses and disbursements Net investment income (if negative, enter -0-)	-319,150.	292,668.	<u> </u>	
			Adjusted net income (if negative, enter -0-)		272,000.	N/A	

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	12,796,074.
2	Enter amount from Part I, line 27a	2	-319,150.
3	Other increases not included in line 2 (itemize)	3	0.
4	Add lines 1, 2, and 3	4	12,476,924.
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	12,476,924.
_			- 000 DE

606,752.

8

See the Part VI instructions.

8 Enter qualifying distributions from Part XII, line 4

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

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Tall Exempt operating foundations described in section 4940(d)(2), check here ▶ and enter **TWY co. line 1. Date of riving or determination latter: Date of riving or determination latter: Date of riving or determination latter: Of Part, Ikee 27b Dementic foundations that meet the section 4940(a) requirements in Part V, Ceck here ▶ \$\bigcit{2} \text{ and enter YW} \text{ of Part, Ikee 27b} \text{ of All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part, I line 12, cot. (b) \$\bigcit{2} \text{ 2} \text{ 3.4 Add lines 1 and 2} \text{ of Part, Ikee 27b} \text{ 3.4 Add lines 1 and 2} \text{ 3.5 Add lines 1 and 2} 3.5 Add lines 1 and 3.5 Add lines 2 and 3.5 Add lines 3 and 3.5 Add lines 3 and 3 add lines 3 add lines 3 and 3 add lines 3 ad	orm 990-PF (2019) THE W S AND LOIS VANDALSON FOUNDATION 38-360 Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see			age 4 s)
Disease for Julyagor determination letter:				
of Part I, line 27b			«_	
c. All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, cot. (b) 2	b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► X and enter 1%	2	2,92	<u> 27.</u>
2 Tax under section 51 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter-0-) 3 Add tines 1 and 2 4 Subtitle A (mocine) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter-0-) 5 Tax based on investment income Subtract tine 4 from line 3.1 (are or less, enter-0-) 5 Tax based on investment income Subtract tine 4 from line 3.1 (are or less, enter-0-) 5 Tax based on investment income Subtract tine 4 from line 3.1 (are or less, enter-0-) 5 Exempt forcing organizations - tax withheld at source 6 0 0.1 6 0 0.1 6 0 0.1 6 0 0.1 6 0 0.1 6 0 0.1 6 0 0.1 7 Total credits and payments. Add lines 5 a through 6d 8 Einter any penalty for underpayment of estimated tax. Check here if the firm 2220 is attached 9 Tax use. If the total of lines 5 and 6 is more than line 7, enter amount owe 10 Overpayment I filling? I's more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I's more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I's more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I's more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I's more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I's more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I's more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I'm more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I'm more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I'm more than the total of lines 5 and 6, enter the amount overpaid 10 Overpayment I filling? I'm more than 5 the total credited to 200 overpaid to enter the amount overpaid of lines 5 and 6, enter the amount overpaid overpaid to enterpaid to				
3 Add lines 1 and 2 Subtile A (nomestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- Cordes/Payments. 2 2019 sestmated bar payments and 2018 overpayment oredited to 2019 ■ Exempt foreign organizations - tax withheld at source. ■ 2 3019 sestmated barpolican for redeations of this to the (Form 8868) ■ 0. ■ Care tax payments, Add lines 6 through 65 ■ Einer any penalty for underpayment of estimated tax. Check here if it Form 2220 is attached ■ Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than line 17, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than line 17, enter amount overed ■ Tax dee. If the total of lines 5 and 8 is more than 10 to 2, 49.3. Instance 4 ■ Tax dee. If the total of lines 5 and 8 is more than 10 to 2, 49.3. Instance 4 ■ Tax dee. If the total of lines 5 and 8 is more than 10 to 200 estimated tax. Payment of 10 to 2, 49.3. Instance 4 ■ Tax dee. If the total of lines 5 and 8 is more than 10 to 200 estimated tax. Payment of 10 to 2, 49.3. Instance 4 ■ Tax dee. In the total of lines 5 and 8 is the mount overpayment of 10 to 10		-	L	
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6 Credits/Payments: a 2019 estimated tax payments and 2018 overpayment credited to 2019 b. Exempt foreign organizations - tax withheld at source c. Tax paid with application for extension of time to file (Form 8868) b. Co. d. Co. d. Backup withholding erroneously withheld c. Co. Total credits and payments. Add lines 6a through 6d c. Co. Total credits and payments. Add lines 6a through 6d c. Either any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached c. Total credits and payments. Add lines 6a through 6d c. Either any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached c. Total credits and payments. Add lines 6a through 6d c. Either the amount of the 10th 6d in	4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			<u>0.</u>
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C Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 6 d 0. d 8 Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached 8 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment I line 7 is more than the fotal of lines 5 and 8, enter the amount owed 10 Overpayment I line 7 is more than the fotal of lines 5 and 8, enter the amount owed 10 Overpayment I line 7 is more than the fotal of lines 5 and 8, enter the amount owed 10 Overpayment I line 7 is more than the fotal of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Oredited to 2020 estimated tax ► Part VII-A Statements Regarding Activities 12 During the tax year, did the foundation attempt 10 influence any national, state, or local legislation or did it participate or intervene in any political campaign? 12 During the tax year, did the foundation attempt 10 influence any national, state, or local legislation or did it participate or intervene in any political campaign? 13 During the tax year, did the foundation attempt 10 influence any national, state, or local legislation or did it participate or intervene in any political campaign? 14 During the tax year, did the foundation attempt 10 influence any national, state, or local legislation or did it participate or intervene in any political campaigns. 15 During the tax year, did the foundation attempt 10 influence any national, state, or local legislation or did it participate or intervene in any political campaigns. 15 During the tax year, did the foundation of the activities and copies of any materials published or distributed by the Coundation of the activities. 16 During the tax year of the activities and copies of any materials published or distributed by the Coundation of the activities. 18 During the tax year, did the foundation file activities. 19 During the tax year, did the foundation file activities. 20 During the tax yea				,
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8 Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached 9 1	d Backup withholding erroneously withheld	_		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Tenter the amount of line 10 to be: Credited to 2020 estimated fax 2, 493. Refunded 11 0.0. Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any obtinated any political campaign? 1b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes? See the instructions for the definition It is a support of the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation. So D. (2) On foundation managers. So D. (3) On foundation managers. So D. (4) On foundation managers. So D. (5) On foundation managers. So D. (6) On foundation managers. So D. (7) On the coundation managers. So D. (8) On foundation m			5,42	<u> </u>
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Part VII-A Statements Regarding Activities 1a Durng the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities c Did the foundation like Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$		2	2,49	
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the answer is "Yes" to 1 or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities c Did the foundation file Form 1120-PDL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yes," attach the statement required by General Instruction T A return engine and equipment in the governing instrument, or By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument or				<u>0.</u>
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b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities c Did the foundation file Form 1120-PDL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ O. (2) On foundation managers. ► \$ O. e Enter the remibursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ O. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 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 4 Did the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yes," has it filed a tax return on Form 990-T for this year? N/A b If "Yes," statch the statement required by General Instruction T Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: 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? 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 The first the states to which the foundation reports or with which it is registered. See instructions. ► MI b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation If the answer	· · · ·		res	
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities c Did the foundation file Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? b If "Yes," has it filed a tax return on Form 990-T for this year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument? 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV 7 X 8a Enter the states to which the foundation reports or with which it is registered. See instructions. ■ If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation 9 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				
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			-PF (2019)

THE W S AND LOIS VANDALSON FOUNDATION 38-3607246 Form 990-PF (2019) Page 5 Part VII-A Statements Regarding Activities (continued) Yes No 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions 11 X 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions 12 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Website address ► N/A 14 The books are in care of ▶ ALFRED GEMRICH Telephone no ▶269 623 8533 Located at ▶ 2347 WEST DOWLING ROAD, DELTON, ZIP+4 ▶49046 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here N/A 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 over a bank, Yes No securities, or other financial account in a foreign country? 16 See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required Yes No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly): Yes X No (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) Yes X No a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? X Yes (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 Yes X No 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 Yes X No 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 X 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 c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019? 10 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation

Yes X Ño 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach

statement - see instructions.)

c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.

a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines

defined in section 4942(j)(3) or 4942(j)(5)):

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the 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.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

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?

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N/A

Yes X No

2b

3b

4a

Form 990-PF (2019) THE W S AND LOIS VANDALS	SON FOUNDATION	N Decretion of t	<u>38-36072</u>	46	Page 6
Part VII-B Statements Regarding Activities for Which	Form 4/20 May Be I	Requirea (contin	ued)	136	T & 1 -
5a During the year, did the foundation pay or incur any amount to:				Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section			es X No		
(2) Influence the outcome of any specific public election (see section 4955);	or to carry on, directly or indir			, .	'
any voter registration drive?			es 🔀 No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	5?	Ye	es 🗓 No		
(4) Provide a grant to an organization other than a charitable, etc., organization	on described in section			-	
4945(d)(4)(A)? See instructions		Y	es 🗶 No		١.
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, or i	for		•	
the prevention of cruelty to children or animals?		Y	es X No		,
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described	ın Regulations			l .
section 53 4945 or in a current notice regarding disaster assistance? See insti	ructions		N/A	5b	1
Organizations relying on a current notice regarding disaster assistance, check	here		▶□ 「		-
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption		ined			. ;
expenditure responsibility for the grant?			es 🔲 No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		•			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on				
a personal benefit contract?		Y	es X No	İ	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?		•	6b	Х
If "Yes" to 6b, file Form 8870.					<u> </u>
7a At any time during the tax year, was the foundation a party to a prohibited tax	shelter transaction?	Ye	es 🗓 No		
b If "Yes," did the foundation receive any proceeds or have any net income attrib				7b	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than		r			ļ, ,
excess parachute payment(s) during the year?	- .,		es X No	· ,	,
Part VIII Information About Officers, Directors, Trust	tees, Foundation Ma				
Paid Employees, and Contractors	•				
1 List all officers, directors, trustees, and foundation managers and	their compensation.				
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Exp account	ense
(a) Name and address	to position	(If not paid, enter -0-)	and deferred compensation	allowa	inces
ALFRED J. GEMRICH	PRESIDENT/BOA	RD CHAIR/	SECR		
2347 WEST DOWLING ROAD	1		•		
DELTON, MI 49046	0.50	1,500.	0.		0.
SYDNEY E. PARFET	VICE-PRESIDEN	T/ASSISTA	NT S		
9734 WEST GULL LAKE DRIVE	7		1		
RICHLAND, MI 49083	0.50	1,500.	. 0.		0,
BARBARA L. JAMES	TREASURER				
2252 W. GLENEAGLE DRIVE	7				
KALAMAZOO, MI 49048	0.50	1,500.	0.		0.
REX L. BELL	+	ASURER			
6549 HOLLISON DRIVE		,			
KALAMAZOO, MI 49009	0.50	1,500.	0.		0,
2 Compensation of five highest-paid employees (other than those inc					
	(b) Title, and average		(d) Contributions to employee benefit plans and deferred	(e) Exp	ense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	ačcount allowa	, oiner inces
NONE			,		
		1		1	
	-				

Part VIII Information About Officers, Directors, Trustees, Foundation		000/246 Page/
Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter	r "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
GREENLEAF TRUST, INC.	INVESTMENT	
211 S ROSE STREET, KALAMAZOO, MI 49007	MANAGEMENT	51,095.
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities		▶ 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statis number of organizations and other beneficiaries served, conferences convened, research papers pro-	tical information such as the	Expenses
1 N/A	55000, 010.	
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 1 N/A	lines 1 and 2.	Amount
		,
2		
All other program-related investments. See instructions.		
3		
Total, Add lines 1 through 3	>	0.
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P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndation	s, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	12,656,483.
	Average of monthly cash balances	1b	258,829.
	Fair market value of all other assets	1c	
	Total (add lines 1a, b, and c)	1đ	12,915,312.
	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	12,915,312.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	193,730.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,721,582.
6	Minimum investment return Enter 5% of line 5	6	636,079.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an	d certair	1
	foreign organizations, check here 🕨 🔙 and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	<u>636,079.</u>
2a	Tax on investment income for 2019 from Part VI, line 5		
b	Income tax for 2019. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	2,927.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	633,152.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	633,152.
6	Deduction from distributable amount (see instructions)	6	<u>0.</u>
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	633,152.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		<u> </u>
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	606,752 .
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	606,752.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	⁻	
	income. Enter 1% of Part I, line 27b	5	2,927.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	603,825.
	Note: The amount on line 6 will be used in Part V. column (b), in subsequent years when calculating whether the foundation of	ualifies	for the section

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4940(e) reduction of tax in those years

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,				
line 7				633,152.
2 Undistributed income, if any, as of the end of 2019			" <u> </u>	
a Enter amount for 2018 only			351,194.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2019				
a From 2014				
b From 2015		,		
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from				
Part XII, line 4: ► \$ 606,752.			251 104	ŀ
a Applied to 2018, but not more than line 2a			351,194.	
b Applied to undistributed income of prior		_		ï
years (Election required - see instructions)		0.	<u></u>	,
c Treated as distributions out of corpus	•			
(Election required - see instructions)	0.			255 550
d Applied to 2019 distributable amount		· ···		255,558.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			· · · · · · · · · · · · · · · · · · ·
b Prior years' undistributed income Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of				
deficiency has been issued, or on which				
the section 4942(a) tax has been previously assessed		0.		•
d Subtract line 6c from line 6b. Taxable				- 1- 1 1
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				
be distributed in 2020				377,594.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				1
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)	0.			4
8 Excess distributions carryover from 2014				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020				
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				5 000 DE (0040)

Form 990-PF (2019) THE W S Part XIV Private Operating F	AND LOIS V	ANDALSON FO	OUNDATION	38-36 N/A	0724.6 Page 10
			TA, question of	Ν/ Δ	/
1 a If the foundation has received a ruling o					
foundation, and the ruling is effective for b Check box to indicate whether the found			un section] 4942(J)(3) or 49	42(1)(5)
		ig loulidation described	Prior 3 years	1 4342())(3) 01	42(])(3)
2 a Enter the lesser of the adjusted net	Tax year (a) 2019	(b) 2018	(c) 2017	(6) 2016	(e) Total
income from Part I or the minimum	(a) 2013	(8) 2010	(0) 2017	40,20.0	(0) 10121
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			 /	<u> </u>	
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			<u> </u>		
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter					
2/3 of minimum investment return shown in Part X, line 6, for each year					
listed			<u> </u>		
c "Support" alternative test - enter:		7			
(1) Total support other than gross	/				
investment income (interest,					
dividends, rents, payments on	/				
securities loans (section 512(a)(5)), or royalties)	/				
(2) Support from general public	/		-		
and 5 or more exempt					
organizations as provided in section 4942(j)(3)(B)(iii)	/				
(3) Largest amount of support from	/				
an exempt organization	/				
(4) Gross investment income					
Part XV Supplementary Info	rmation (Comple	te this part only	if the foundation	n had \$5,000 or mo	ore in assets
at any time during t				40,000 0	
			·		
 Information Regarding Foundation List any managers of the foundation wh 		than OO/ of the total con	tributions reserved by the	n foundation hafara the ala	so of any tay
year (but only if they have contributed n			illibutions received by the	5 IOUIIUALIOII DEIOIE LIIE CIO	oc or any tax
• • •		30.0 33. (3)(=)			
NONE	100/	a stack of a paragration	/or on aqually large part	upo of the oursership of a o	artnerchie er
b List any managers of the foundation wh other entity) of which the foundation has			(or an equally large port	ion of the ownership of a pa	artifici Strip Of
•••	ou 1070 or grouter interes	,			
NONE		<u> </u>			
2 Information Regarding Contributi					anta fan familia 16
Check here X if the foundation of the foundation makes gifts, grants, etc.,					ests for funds. II
a The name, address, and telephone num	ber or email address of th	e person to whom appl	cations should be addres	ssed:	
b The form in which applications should b	e submitted and informa	tion and materials they s	should include:		
c Any submission deadlines;					
d Any restrictions or limitations on awards	s, such as by geographic	al areas, charitable fields	, kınds of ınstitutions, or	other factors:	

38-3607246 Form 990-PF (2019) THE W S AND LOIS VANDALSON FOUNDATION Page 11 Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount status of contribution any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year NONE PUBLIC CHARITY GENERAL AACORN, FARMS, INC 6409 S 34TH ST KALAMAZOO MI 49048 10,000. PUBLIC CHARITY GENERAL NONE BRONSON HEALTH FOUNDATION 301 JOHN STREET 10,000. KALAMAZOO MI 49007 PUBLIC CHARITY GENERAL NONE CHEFF CENTER 8450 N 43RD STREET 25,000. AUGUSTA, MI 49012 NONE PUBLIC CHARITY GENERAL COMMUNITY IN SCHOOLS OF KALAMAZOO 125 W EXCHANGE PLACE 30,000, KALAMAZOO, MI 49007 PUBLIC CHARITY GENERAL COMSTOCK COMMUNITY CENTER NONE 6330 KING HWY 15 000 KALAMAZOO MI 49048 SEE CONTINUATION SHEET(S) ➤ 3a 600 000. Total b Approved for future payment NONE

▶ 3b

Total

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THE W S AND LOIS VANDALSON FOUNDATION

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Purpose of grant or Foundation show any relationship to Amount status of contribution any foundation manager Name and address (home or business) or substantial contributor recipient DISABILITY NETWORK NONE PUBLIC CHARITY GENERAL 517 EAST CROSSTOWN PARKWAY KALAMAZOO, MI 49001 20,000. DOUGLASS COMMUNITY ASSOCIATION NONE PUBLIC CHARITY GENERAL 1000 W PATERSON ST KALAMAZOO, MI 49007 20,000, PUBLIC CHARITY GENERAL ERACCE ELIMINATING RACISM NONE 2348 RING ROAD NORTH KALAMAZOO MI 49006 5,000, NONE PUBLIC CHARITY GENERAL FAMILY & CHILDREN SERVICES, INC. 1608 LAKE STREET KALAMAZOO MI 49001 40,000. NONE PUBLIC CHARITY GENERAL FIRE HISTORICAL & CULTURAL ARTS COLLABORATIVE 1249 PORTAGE STREET KALAMAZOO, MI 49001 5,000. NONE PUBLIC CHARITY GENERAL GILMORE INTERNATIONAL KEYBOARD **FESTIVAL** 359 SOUTH KALAMAZOO MALL SUITE 101 KALAMAZOO MI 49007 5,000, KAIROS DWELLING NONE PUBLIC CHARITY GENERAL 2945 GULL ROAD KALAMAZOO, MI 49048 5,000, KALAMAZOO COLLEGE NONE PUBLIC CHARITY GENERAL 1200 ACADEMY STREET KALAMAZOO MI 49006 <u>6</u>5,000, NONE PUBLIC CHARITY GENERAL KALAMAZOO COUNTY PARKS & RECREATION PO BOX 50467 KALAMAZOO MI 49005 20,000. PUBLIC CHARITY GENERAL KALAMAZOO LITERACY COUNCIL NONE 420 E ALCOTT ST, STE 400 KALAMAZOO, MI 49001 15,000. Total from continuation sheets 510 000.

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount status of contribution any foundation manager Name and address (home or business) recipient or substantial contributor KALAMAZOO LOAVES & FISHES NONE PUBLIC CHARITY GENERAL 901 PORTAGE STREET 35,000. KALAMAZOO, MI 49001 KALAMAZOO NEIGHBORHOOD HOUSING, INC NONE PUBLIC CHARITY GENERAL 1219 S PARK ST KALAMAZOO MI 49001 10,000. KALAMAZOO REGIONAL EDUCATIONAL NONE PUBLIC CHARITY GENERAL SERVICE AGENCY 1819 E. MILHAM AVENUE PORTAGE MI 49002 10,000. KALAMAZOO VALLEY HABITAT FOR HUMANITY PUBLIC CHARITY GENERAL 1126 GULL ROAD KALAMAZOO MI 49048 5,000. KC READY 4S NONE PUBLIC CHARITY GENERAL 259 E MICHIGAN AVE STE 409 KALAMAZOO MI 49007 35,000. NONE PUBLIC CHARITY GENERAL LENDING HANDS OF MICHIGAN 2403 HELEN AVE PORTAGE MI 49002 5,000. MINISTRY WITH COMMUNITY NONE PUBLIC CHARITY GENERAL 500 N EDWARDS STREET KALAMAZOO MI 49007 20,000. NEW GENESIS, INC NONE PUBLIC CHARITY GENERAL 1225 W PATERSON ST KALAMAZOO, MI 49007 10,000. PUBLIC CHARITY GENERAL PRETTY LAKE CAMP NONE 9123 Q AVE MATTAWAN MI 49071 15,000. PUBLIC CHARITY GENERAL READ AND WRITE KALAMAZOO NONE 802 S WESTNEDGE AVE KALAMAZOO, MI 49008 5,000. Total from continuation sheets

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THE W S AND LOIS VANDALSON FOUNDATION

Part XV **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient show any relationship to any foundation manager or substantial contributor Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient NONE PUBLIC CHARITY GENERAL SHERMAN LAKE YMCA OUTDOOR CENTER 6225 N 39TH STREET 40,000. AUGUSTA, MI 49012 SOUTHWEST MICHIGAN LAND CONSERVANCY NONE PUBLIC CHARITY GENERAL 8395 E MAIN STREET 50,000. GALESBURG MI 49053 YWCA OF KALAMAZOO NONE PUBLIC CHARITY GENERAL 353 E MICHIGAN AVE 70,000. KALAMAZOO MI 49007 Total from continuation sheets

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

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income	Exclu	ded by section 512, 513, or 514	(e)
Effet gross amounts unless otherwise maleated.	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Droorem conven ravanuar	Business	Amount	sion	Amount	function income
1 Program service revenue:	code				
a			 		
b			 		
·			ļ		 -
d			├		
e	<u> </u>		 		
f			ļ	-	
g Fees and contracts from government agencies					
2 Membership dues and assessments			 		
3 Interest on savings and temporary cash					
investments	ļi				
4 Dividends and interest from securities			14	252,649.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					·····
b Not debt-financed property		· · · · · · · · · · · · · · · · · · ·			
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory			18	101,465.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					******
11 Other revenue:					
					·
	····				
<u> </u>	_ -				
d	-	<u> </u>			<u> </u>
40 Cubtatal Add calumns (b) (d) and (a)		0.		354,114.	0.
12 Subtotal. Add columns (b), (d), and (e)					354,114.
13 Total Add line 12, columns (b), (d), and (e)				13	334,114.
(See worksheet in line 13 instructions to verify calculations)					<u></u>
Part XVI-B Relationship of Activities to	the Acco	omplishment of Ex	emp	t Purposes	
Line No Explain below how each activity for which incom	n io roportod i	n column (a) of Part VVI-A		uited importantly to the secon	nolahmant of
Explain below how each activity for which income the foundation's exempt purposes (other than be		nds for such nurnoses)			
The foundation 3 exempt purposes (errici trial o	y providing to		·		
	 .			·	
					
				·	<u> </u>
					
	<u> </u>				
					
					_
					
					<u></u>
			_		
					

orm 9 Part			egarding Tran		IDALSON FOUNI and Transactions a				-36072 oncharita		Pa	ige 13
1 D	d the	organization directly or indi		of the follows	no with any other organizati	on de	scribed in sec	 tion 501(c)			Yes	No
		nan section 501(c)(3) organ					3011060 111 366	11011 30 1(0)		ŀ		
		rs from the reporting found	•	•	- •				Į	1		
) Cas	· -	ation to a nononanta	ible exclipt of	gamzation or,				١,	a(1)		X
•	•	er assets								a(2)		X
•	•	ansactions:							<u> </u>	4(2)		
		es of assets to a noncharita	hle exempt organiza	tion					١,	b(1)		X
•	•	chases of assets from a no	, ,							b(2)		X
-	-	ital of facilities, equipment,		or gameano						b(3)		X
•	•	mbursement arrangements							[-	b(4)		X
•	•	ins or loan guarantees								b(5)		X
•	•	formance of services or me	mbership or fundrai	sing solicitatio	ons					b(6)		X
•	-	of facilities, equipment, ma		=						1c		X
10	servi	swer to any of the above is ces given by the reporting f	oundation. If the fou	ndation receiv	ed less than fair market val				-		ets,	
		(d) the value of the goods,	,				(4) -					
a) Line	no	(b) Amount involved	(c) Name of		e exempt organization	_	(U) Descriptio	n of transfers, transa	ctions, and shar	ng arra	angeme	nts
	+			N/A		+	-					
		-	<u> </u>									
	-	-						- <u></u> -				
	-				·	+				-		
		· · · · · · · · · · · · · · · · · · ·				\dashv		 -				
	-			-		\dashv		- · · · · · · · · · · · · · · · · · · ·				
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						+						
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ın	sectio	undation directly or indirect in 501(c) (other than section complete the following sch	n 501(c)(3)) or in se		or more tax-exempt organ	ızatıor	ns described			Yes	X] No
		(a) Name of org			(b) Type of organization			(c) Description o	f relationship			
		N/A										
		· · · · · · · · · · · · · · · · · · ·										
Sign Here	and	er penalties of perjury, I declare belief, it is true, correct, and con						r has any knowledge	return w	ith the	prepare	er
	1 510	gnature of officer or trustee			Date /		Title					
		Print/Type preparer's na	ranje	Preparer's s	ignature	Date		Check if self- employed	PTIN			

AMY L. TAYLOR

05/06/20

Phone no. 269-384-0219 Form **990-PF** (2019)

P00630479

Preparer

Use Only

AMY L. TAYLOR

Firm's name ► JAMES & SPRINGGATE PLC

Firm's address ▶ 490 WEST SOUTH STREET

KALAMAZOO, MI 49007

FORM 990-PF DIVIDENT	OS AND INTER	EST FROM SECUR	ITIES ST	PATEMENT 1
GROSS SOURCE AMOUNT	CAPITAL GAINS DIVIDEND	(A) REVENUE S PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INT/DIV GREENLEAF 383,634	130,98	5. 252,649.	252,649.	
TO PART I, LINE 4 383,63	130,98	5. 252,649.	252,649.	
FORM 990-PF	LEGAL	FEES	ST	PATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) · ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	3,514.	1,757.		1,757.
TO FM 990-PF, PG 1, LN 16A	3,514.	1,757.		1,757.
FORM 990-PF	ACCOUNTI	NG FEES	Sī	PATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	1,300.	650.		650.
TO FORM 990-PF, PG 1, LN 16B	1,300.	650.		650.
FORM 990-PF (OTHER PROFES	SIONAL FEES	Sī	ATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	51,095.	51,095.		0.
TO FORM 990-PF, PG 1, LN 16C	51,095.	51,095.	,	0.

FORM . 990-PF	TAX	ES	·		STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO		(C) ADJUSTED NET INCOM	
EXCISE TAX FOREIGN TAXES	5,066. 4,944.	4,9	0.		0.
TO FORM 990-PF, PG 1, LN 18	10,010.	4,9	944.		0.
FORM 990-PF	OTHER E	XPENSES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO	_	(C) ADJUSTED NET INCOM	
INSURANCE EDUCATION - DIRECTOR'S	920. 425.		0.		920. 425.
TO FORM 990-PF, PG 1, LN 23	1,345.		0.		1,345.
FORM 990-PF U.S. AND	STATE/CITY G	OVERNMENT	OBLI	GATIONS	STATEMENT 7
DESCRIPTION	U.S GOV'		вос	K VALUE	FAIR MARKET VALUE
UNITED STATES TREAS NTS 2.25				247,589.	246,825.
UNITED STATES TREAS NTS 2.0% 11/15/2026 UNITED STATES TREAS NTS 2.12				168,858.	
12/31/2022 UNITED STATES TREAS NTS 2.25 11/15/2025	% х			145,770. 143,506.	152,285. 154,084.
UNITED STATES TREAS NTS 2.25	% X			349,386.	368,198.
12/31/2023	Q. 17				
12/31/2023 UNITED STATES TREAS NTS 2.259 12/31/2024		_		144,445.	153,996.
12/31/2023 UNITED STATES TREAS NTS 2.25	FIONS	- IGATIONS	1	144,445.	153,996.

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STATEMENT

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FORM 990-PF

DESCRIPTION AGG MANAGER FURTHERS GERNARDOW FURTH	BOOK VALUE	FAIR MARKET VALUE
ASG MANAGED FUTURES STRATEGY FUND BLACKROCK EQUITY DIVIDEND FUND DELAWARE EMERGING MARKETS FUND R6 IQ MERGER ARBITRAGE ETF ISHARES CORE MSCI EAFE ETF ISHARES CORE S&P 500 INDEX ISHARES CORE S&P MIDCAP 400 INDEX ISHARES S&P MIDCAP 400 GROWTH ETF ISHARES S&P SMALLCAP 600 GROWTH ETF ISHARES CORE S&P SMALLCAP 600 INDEX ISHARES TR S&P MIDCAP VALUE INDEX ISHARES TR S&P SMALLCAP VALUE INDEX ISHARES TR S&P SMALLCAP VALUE INDEX MATTHEWS PACIFIC TIGER FUND PEAR TREE POLARIS FOREIGN VALUE FUND STERLING CAPITAL EQUITY INCOME FUND T. ROWE PRICE GROWTH STOCK TOUCHSTONE SANDS CAP GROWTH FUND	190,243. 463,145. 563,100. 184,740. 598,092. 3,274,404. 560,635. 80,304. 62,336. 234,058. 113,833. 100,923. 591,503. 450,000. 407,703. 422,114. 479,467.	186,108. 431,655. 620,729. 199,034. 613,256. 3,811,000. 576,296. 116,436. 97,230. 336,490. 116,950. 96,480. 573,104. 459,557. 430,282. 446,195. 437,848.
WCM FOCUSED INTN'L GROWTH FUND TOTAL TO FORM 990-PF, PART II, LINE 10B	9,226,600.	473,013.
FORM 990-PF CORPORATE BONDS		STATEMENT 9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AGILENT TECHNOLOGIES INC 3.2% 10/01/2022 AMAZON COM INC 3.3% 12/05/2021 AMGEN INC 3.45% 10/01/2020 APPLE INC 3.25% 02/23/2026 AT&T INC 2.8% 02/17/2021 BOEING CO 2.2% 10/30/2022 COSTCO WHOLESALE CORP 2.75% 05/18/2024 DUKE ENERGY CORP 1.8% 09/01/2021 EBAY INC 3.45% 08/01/2024 ECOLAB INC 2.25% 01/12/2020 EXXON MOBIL CORP 2.397% 03/06/2022 INTERCONTINENTAL EXCHANGE I 2.75% 12/01/2020 ISHARES INTERMEDIATE GOV/CRED BOND ETF JOHNSON & JOHNSON 3.375% 12/05/2023 JPMORGAN CHASE & CO 3.125% 01/23/2025 MFS EMERGING MARKETS DEBT FD R6 MOODYS CORP 2.625% 1/15/23 OMNICOM GROUP INC 4.45% 08/15/2020	49,128. 50,243. 50,209. 48,801. 49,235. 48,036. 48,316. 47,660. 48,643. 49,449. 48,855. 49,637. 265,333. 50,354. 47,822. 80,000. 50,722. 30,572.	51,166. 51,449. 50,573. 52,954. 50,450. 50,228. 51,772. 49,959. 52,317. 49,999. 50,545. 50,370. 279,059. 53,132. 52,182. 80,215. 50,758. 30,607.

CORPORATE STOCK

THE W S AND LOIS VANDALSON FOUN	FOUNDATION		38-3607246						
ORACLE CORP 1.9% 09/15/2021		48,197.	50,105.						
PAYPAL HOLDINGS INC 2.4% 10/01/2024 PPG INDS INC 3.2% 03/15/2023 REPUBLIC SVCS INC 3.55% 06/01/2022 STARBUCKS CORP 2.1% 02/04/2021 UNION PAC CORP 3.2% 06/08/2021		50,195. 49,523. 50,133. 48,849. 50,020. 47,891. 275,000. 47,515. 52,155.	50,493. 51,617. 51,657. 50,124. 50,959. 52,374. 276,877. 50,515.						
				UNITEDHEALTH GROUP INC 3.1% 03/15					
				VANGUARD S/T INFLATION PROTECTED SEC ADMIRAL WASTE MANAGEMENT INC 2.4% 5/15/2023 WELLS FARGO CO MTN BE 3.3% 09/9/2024					
						TOTAL TO FORM 990-PF, PART II, LI	NE 10C	1,832,493.	1,894,857.
						FORM 990-PF	OTHER ASSETS		STATEMENT 10
	BEGINNING OF			END OF YEAR	FAIR MARKET				
DESCRIPTION	YR BOOK VALUE			BOOK VALUE	VALUE				
DIVIDEND/INTEREST RECEIVABLE	0.			9,671.	9,671.				
TO FORM 990-PF, PART II, LINE 15	0.			9,671.	9,671.				