

Return of Private Foundation

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

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2018

Open to Public Inspection

Form **990-PF**

Department of the Treasury
Internal Revenue Service

For calendar year 2018 or tax year beginning

, and ending

Name of foundation THE SUDBURY FOUNDATION		A Employer identification number 04-6037026
Number and street (or P.O. box number if mail is not delivered to street address) 326 CONCORD RD	Room/suite	B Telephone number 978-443-0849
City or town, state or province, country, and ZIP or foreign postal code SUDBURY, MA 01776		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 30,638,404.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
(Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	641,621.	553,552.		STATEMENT 5
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,653,870.			STATEMENT 4
	b Gross sales price for all assets on line 6a 23,080,291.				
	7 Capital gain net income (from Part IV, line 2)		1,661,166.		
	8 Net short-term capital gain				
	9 Income modifications			25,000.	
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income	38,492.	0.	0.	STATEMENT 6	
12 Total. Add lines 1 through 11	2,333,983.	2,214,718.	25,000.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	264,533.	130,533.	0.	134,000.
	14 Other employee salaries and wages	69,092.	0.	0.	69,092.
	15 Pension plans, employee benefits	53,042.	0.	0.	52,706.
	16a Legal fees				
	b Accounting fees STMT 7	19,159.	1,915.	0.	17,244.
	c Other professional fees STMT 8	15,743.	0.	0.	15,743.
	17 Interest				
	18 Taxes STMT 9	36,095.	0.	0.	14,418.
	19 Depreciation and depletion	19,483.	0.	0.	
	20 Occupancy	29,470.	0.	0.	29,470.
	21 Travel, conferences, and meetings	3,049.	0.	0.	3,049.
	22 Printing and publications				
	23 Other expenses STMT 10	-26,061.	0.	0.	23,471.
	24 Total operating and administrative expenses. Add lines 13 through 23	483,605.	132,448.	0.	359,193.
	25 Contributions, gifts, grants paid	1,604,669.			1,391,169.
26 Total expenses and disbursements. Add lines 24 and 25	2,088,274.	132,448.	0.	1,750,362.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	245,709.				
b Net investment income (if negative, enter -0-)		2,082,270.			
c Adjusted net income (if negative, enter -0-)			25,000.		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only.			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	14,944.	14,061.	14,061.	
	2 Savings and temporary cash investments	769,321.	871,237.	871,237.	
	3 Accounts receivable	8,685.			
	Less: allowance for doubtful accounts	6,404.	8,685.	8,685.	
	4 Pledges receivable				
	Less: allowance for doubtful accounts				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable				
	Less: allowance for doubtful accounts				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges	1,419.	17,092.	17,092.	
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock				
	c Investments - corporate bonds	STMT 11	6,025,986.	5,847,706.	5,847,706.
	11 Investments - land, buildings, and equipment: basis				
Less: accumulated depreciation					
12 Investments - mortgage loans					
13 Investments - other	STMT 12	26,828,118.	22,835,858.	22,835,858.	
14 Land, buildings, and equipment: basis	1,291,003.				
Less: accumulated depreciation	STMT 13	256,639.	1,047,833.	1,034,364.	
15 Other assets (describe)	STATEMENT 14	0.	9,401.	9,401.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		34,694,025.	30,638,404.	30,638,404.	
Liabilities	17 Accounts payable and accrued expenses		8,466.		
	18 Grants payable	132,000.	348,000.		
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe)	STATEMENT 15	42,631.	0.	
23 Total liabilities (add lines 17 through 22)		174,631.	356,466.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here	<input checked="" type="checkbox"/>			
	and complete lines 24 through 26, and lines 30 and 31.				
	24 Unrestricted		34,519,394.	30,281,938.	
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here	<input type="checkbox"/>			
	and complete lines 27 through 31.				
27 Capital stock, trust principal, or current funds					
28 Paid-in or capital surplus, or land, bldg., and equipment fund					
29 Retained earnings, accumulated income, endowment, or other funds					
30 Total net assets or fund balances		34,519,394.	30,281,938.		
31 Total liabilities and net assets/fund balances		34,694,025.	30,638,404.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	34,519,394.
2 Enter amount from Part I, line 27a	2	245,709.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	34,765,103.
5 Decreases not included in line 2 (itemize) UNREALIZED LOSS ON INVESTMENTS	5	4,483,165.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	30,281,938.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
a 23,080,291.		21,419,125.	1,661,166.	
b				
c				
d				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a			1,661,166.	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2 1,661,166.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		{ }		3 N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	1,661,970.	31,977,911.	.051972
2016	1,374,319.	29,630,784.	.046381
2015	1,481,959.	30,990,150.	.047820
2014	1,366,470.	33,019,209.	.041384
2013	1,505,639.	31,649,755.	.047572
2 Total of line 1, column (d)			2 .235129
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 .047026
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 32,467,610.
5 Multiply line 4 by line 3			5 1,526,822.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 20,823.
7 Add lines 5 and 6			7 1,547,645.
8 Enter qualifying distributions from Part XII, line 4			8 1,750,362.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	20,823.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	20,823.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	20,823.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	37,999.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	37,999.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	84.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	17,092.	
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax <input checked="" type="checkbox"/> 17,092. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input checked="" type="checkbox"/> <u>MA</u>		
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 <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

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
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?
14 The books are in care of BANK OF AMERICA PHIL. MGMT. GROUP Telephone no. (617) 434-6454
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a During the year, did the foundation (either directly or indirectly):
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
(6) Agree to pay money or property to a government official?
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance?
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018?
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?
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
b If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?
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 2018?

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A	5b	
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	X
If "Yes" to 6b, file Form 8870.			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 16		269,533.	10,050.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PATRICIA BRUNNER 326 CONCORD ROAD, SUDBURY, MA '01776	OPERATIONS MANAGER 30.00	61,000.	4,056.	0.

Total number of other employees paid over \$50,000 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 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 lines 1 and 2.	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	

Total. Add lines 1 through 3 0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	32,029,514.
b	Average of monthly cash balances	1b	906,750.
c	Fair market value of all other assets	1c	25,777.
d	Total (add lines 1a, b, and c)	1d	32,962,041.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	32,962,041.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	494,431.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	32,467,610.
6	Minimum investment return. Enter 5% of line 5	6	1,623,381.

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

1	Minimum investment return from Part X, line 6	1	1,623,381.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	20,823.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	20,823.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,602,558.
4	Recoveries of amounts treated as qualifying distributions	4	25,000.
5	Add lines 3 and 4	5	1,627,558.
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	1,627,558.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,750,362.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	1,750,362.
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	20,823.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,729,539.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				1,627,558.
2 Undistributed income, if any, as of the end of 2018:				
a Enter amount for 2017 only			138,223.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$ 1,750,362.				
a Applied to 2017, but not more than line 2a			138,223.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				1,612,139.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				15,419.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year				(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2 a Enter the lesser of the adjusted net income from Part I or the minimum 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					
(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) 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 Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

SEE STATEMENT 17

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
A PLACE TO TURN 99 HARTFORD STREET NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	5,000.
METROWEST NONPROFIT NETWORK P.O. BOX 1661 FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	125.
PHILANTHROPY MASSACHUSETTS 133 FEDERAL STREET, SUITE 802 BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	5,360.
PHILANTHROPY MASSACHUSETTS 133 FEDERAL STREET, SUITE 802 BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	5,000.
WGBH EDUCATIONAL FOUNDATION ONE GUEST STREET BOSTON, MA 02135		PUBLIC CHARITY	COMMUNITY	5,000.
Total	SEE CONTINUATION SHEET(S)			1,391,169.
b Approved for future payment				
NONE				
Total				0.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
ADVOCATES, INC. 1881 WORCESTER ROAD FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	24,500.
ASSABET VALLEY COLLABORATIVE 28 LORD ROAD, SUITE 125 MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	25,000.
BETHANY HILL PLACE 89 BETHANY ROAD FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	6,000.
BIG BROTHERS BIG SISTERS OF CM/MW 484 MAIN STREET, SUITE 360 WORCESTER, MA 01608		PUBLIC CHARITY	CY&F	25,000.
BIRTHDAY WISHES, INC. PO BOX 590645 NEWTON, MA 02459		PUBLIC CHARITY	CY&F	8,000.
BOYS & GIRLS CLUB OF ASSABET VALLEY 212 GREAT ROAD MAYNARD, MA 01754		PUBLIC CHARITY	CY&F	30,000.
BOYS & GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	25,000.
BOYS & GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	100,000.
COMMUNITIES FOR RESTORATIVE JUSTICE 219 WALDEN STREET, PO BOX 65 CONCORD, MA 01742		PUBLIC CHARITY	CY&F	24,500.
DANIEL JAMES MCCARTHY MEMORIAL FUND 525 MASSACHUSETTS AVE., SUITE A ACTON, MA 01720		PUBLIC CHARITY	CY&F	11,000.
Total from continuation sheets				1,370,684.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
DISCOVERY MUSEUM 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	CY&F	14,000.
DOC WAYNE YOUTH SERVICES, INC. 418 COMMONWEALTH AVENUE BOSTON, MA 02215		PUBLIC CHARITY	CY&F	25,000.
DOC WAYNE YOUTH SERVICES, INC. 418 COMMONWEALTH AVENUE BOSTON, MA 02215		PUBLIC CHARITY	CY&F	4,150.
EMPLOYMENT OPTIONS, INC. 82 BRIGHAM STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	16,000.
FAMILY PROMISE METROWEST 6 MULLIGAN STREET NATICK, MA 01760		PUBLIC CHARITY	CY&F	4,740.
FRAMINGHAM STATE UNIV. FDN/MW COLLEGE PLANNING CENTER 100 STATE STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	5,000.
HOOPS AND HOMEWORK 56 AGNES DRIVE FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	16,280.
JEFF'S PLACE 34 DELOSS STREET, 2ND FLOOR FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	21,000.
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	20,000.
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	4,750.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
JOHN ANDREW MAZIE MEMORIAL FOUNDATION 484 MAIN ST, SUITE 360 WORCESTER, MA 01608		PUBLIC CHARITY	CY&F	25,000.
METROWEST LEGAL SERVICES 63 FOUNTAIN STREET, SUITE 304 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	25,000.
NASHOBA LEARNING GROUP 10 OAK PARK DRIVE BEDFORD, MA 01730		PUBLIC CHARITY	CY&F	11,250.
OUT METROWEST PO BOX 2122 FRAMINGHAM, MA 01703		PUBLIC CHARITY	CY&F	2,210.
REACH BEYOND DOMESTIC VIOLENCE P.O. BOX 540024 WALTHAM, MA 02454		PUBLIC CHARITY	CY&F	5,000.
SPARK KINDNESS 14 SAWIN STREET, PO BOX 823 NATICK, MA 01760		PUBLIC CHARITY	CY&F	3,900.
THRIVE SUPPORT AND ADVOCACY, INC. 65 BOSTON POST ROAD WEST, SUITE 220 MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	4,875.
WAYSIDE YOUTH & FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	24,000.
BOSTON AREA GLEANERS 240 BEAVER STREET WALTHAM, MA 02452		PUBLIC CHARITY	ENVIRONMENT	25,000.
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE ONE SUGARLOAF STREET S. DEERFIELD, MA 01373		PUBLIC CHARITY	ENVIRONMENT	34,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
CONSERVATION LAW FOUNDATION 62 SUMMER STREET BOSTON, MA 02110		PUBLIC CHARITY	ENVIRONMENT	33,000.
GAINING GROUND, INC. P.O. BOX 374 CONCORD, MA 01742		PUBLIC CHARITY	ENVIRONMENT	25,000.
LOVIN' SPOONFULS, INC. 1304 COMMONWEALTH AVENUE, SUITE E BOSTON, MA 02134		PUBLIC CHARITY	ENVIRONMENT	25,000.
MASS FOOD SYSTEM COLLABORATIVE 324 WELLS STREET GREENFIELD, MA 01301		PUBLIC CHARITY	ENVIRONMENT	25,000.
MILL CITY GROWS P.O. BOX 7133 LOWELL, MA 01852		PUBLIC CHARITY	ENVIRONMENT	25,000.
NEW ENTRY SUSTAINABLE FARMING PROJECT 45 MERRIMACK STREET, SUITE 500 LOWELL, MA 01852		PUBLIC CHARITY	ENVIRONMENT	34,000.
REGIONAL ENVIRONMENTAL COUNCIL, INC. PO BOX 255 WORCESTER, MA 01613		PUBLIC CHARITY	ENVIRONMENT	25,000.
THE CARROT PROJECT 89 SOUTH STREET, 7TH FLOOR BOSTON, MA 02111		PUBLIC CHARITY	ENVIRONMENT	33,000.
FRESH START FURNITURE BANK 16 BRENT DRIVE HUDSON, MA 01749		PUBLIC CHARITY	SUDBURY	2,500.
GIFTS OF HOPE UNLIMITED PO BOX 338 SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	12,900.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
GOODNOW LIBRARY FOUNDATION 21 CONCORD ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	5,000.
LONGFELLOW'S WAYSIDE INN 72 WAYSIDE INN ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	59,250.
MARLBOROUGH COMMUNITY DEVELOPMENT CORP. 40 MECHANIC STREET, SUITE 301 MARLBOROUGH, MA 01752		PUBLIC CHARITY	SUDBURY	15,000.
METROWEST FREE MEDICAL PROGRAM 105 HUDSON ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	25,000.
SUDBURY EXTENDED DAY, INC. 327 CONCORD ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	5,000.
SUDBURY GARDEN CLUB 515 NORTH ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	300.
THURSDAY GARDEN CLUB P.O. BOX 52 SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	2,000.
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	55,000.
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	75,000.
TOWN OF SUDBURY - COUNCIL ON AGING 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	18,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
TOWN OF SUDBURY - COUNCIL ON AGING 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	4,732.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMINISTRATIVE BLDG. AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF ROCHESTER PO BOX 270251 ROCHESTER, NY 14627		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MAINE ORONO 5781 WINGATE HALL ORONO, ME 04469		SCHOLARSHIP	SCHOLARSHIP	5,000.
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453		SCHOLARSHIP	SCHOLARSHIP	5,000.
BROWN UNIVERSITY BOX 1827, 69 BROWN STREET PROVIDENCE, RI 02912		SCHOLARSHIP	SCHOLARSHIP	5,000.
CONNECTICUT COLLEGE 270 MOHEGAN AVENUE NEW LONDON, CT 06320		SCHOLARSHIP	SCHOLARSHIP	5,000.
CLEMSON UNIVERSITY G-01 SIKES HALL, BOX 345123 CLEMSON, SC 29634		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF DENVER UNIVERSITY HALL 255, 2197 S. UNIVERSITY BLVD. DENVER, CO 80208		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASS AMHERST 243 WHITMORE ADMINISTRATIVE BLDG. AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
MIAMI UNIVERSITY 301 S. CAMPUS AVENUE OXFORD, OH 45056		SCHOLARSHIP	SCHOLARSHIP	5,000.
NORTHEASTERN UNIVERSITY 354 RICHARDS HALL, 360 HUNTINGTON AVE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOWDOIN COLLEGE 5300 COLLEGE STATION BRUNSWICK, ME 04011		SCHOLARSHIP	SCHOLARSHIP	5,000.
GETTYSBURG COLLEGE CAMPUS BOX 438, 300 N. WASHINGTON STREET GETTYSBURG, PA 17325		SCHOLARSHIP	SCHOLARSHIP	5,000.
HOFSTRA UNIVERSITY 206 MEMORIAL HALL HEMPSTEAD, NY 11549		SCHOLARSHIP	SCHOLARSHIP	5,000.
ASSUMPTION COLLEGE 100 STATE STREET FRAMINGHAM, MA 01701		SCHOLARSHIP	SCHOLARSHIP	5,000.
TUFTS UNIVERSITY DOWLING HALL, 419 BOSTON AVENUE MEDFORD, MA 02155		SCHOLARSHIP	SCHOLARSHIP	5,000.
MASS COLLEGE OF ART 621 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
HOWARD UNIVERSITY 2400 SIXTH STREET NW- SUITE 205 WASHINGTON, DC 20059		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
MIDDLEBURY COLLEGE 84 SOUTH SERVICE ROAD MIDDLEBURY, VT 05753		SCHOLARSHIP	SCHOLARSHIP	5,000.
BATES COLLEGE 44 MOUNTAIN AVENUE LEWISTON, ME 04240		SCHOLARSHIP	SCHOLARSHIP	5,000.
DARTMOUTH COLLEGE 6024 MCNUTT HALL HANOVER, NH 03755		SCHOLARSHIP	SCHOLARSHIP	5,000.
HOFSTRA UNIVERSITY 200 MEMORIAL HALL, ROOM 206 HEMPSTEAD, NY 11549		SCHOLARSHIP	SCHOLARSHIP	5,000.
GEORGIA INSTITUTE OF TECHNOLOGY 225 NORTH AVENUE ATLANTA, GA 30332		SCHOLARSHIP	SCHOLARSHIP	7,500.
NOTRE DAME UNIVERSITY 115 MAIN BUILDING NOTRE DAME, IN 46556		SCHOLARSHIP	SCHOLARSHIP	5,000.
MIDDLEBURY COLLEGE 84 SOUTH SERVICE ROAD MIDDLEBURY, VT 05753		SCHOLARSHIP	SCHOLARSHIP	2,500.
TULANE UNIVERSITY 6823 SAINT CHARLES AVENUE NEW ORLEANS, LA 70118		SCHOLARSHIP	SCHOLARSHIP	5,000.
BENTLEY UNIVERSITY 175 FOREST STREET WALTHAM, MA 02452		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOSTON COLLEGE LYONS HALL, 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467		SCHOLARSHIP	SCHOLARSHIP	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
EMORY UNIVERSITY BOISFEUILLET JONES CTR., STE. 300, 200 DOWMAN DR. ATLANTA, GA 30322		SCHOLARSHIP	SCHOLARSHIP	5,000.
EMORY UNIVERSITY 200 DOWMAN DRIVE, SUITE 300 ATLANTA, GA 30322		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF NEW HAMPSHIRE 11 GARRISON AVENUE DURHAM, NH 03824		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF VIRGINIA 1001 NORTH EMMET ST, PO BOX 400204 CHARLOTTESVILLE, VA 22903		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF CALIFORNIA SAN DIEGO 9500 GILMAN DRIVE, #1103 LA JOLLA, CA 92093		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF TORONTO 172 ST. GEORGE STREET TORONTO, ONTARIO, CANADA, CANADA M5R 0A3		SCHOLARSHIP	SCHOLARSHIP	5,000.
NEW YORK UNIVERSITY 25 WEST 4TH STREET NEW YORK, NY 10012		SCHOLARSHIP	SCHOLARSHIP	5,000.
WHEATON COLLEGE 26 E. MAIN STREET NORTON, MA 02766		SCHOLARSHIP	SCHOLARSHIP	5,000.
STANFORD UNIVERSITY MONTAG HALL, 355 GALVEZ STREET STANFORD, CA 94305		SCHOLARSHIP	SCHOLARSHIP	5,000.
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14850		SCHOLARSHIP	SCHOLARSHIP	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
DARTMOUTH COLLEGE 6024 MCNUTT HALL HANOVER, NH 03755		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MICHIGAN 2500 STUDENT ACTIVITIES CTR., 515 E JEFFERSON ST. ANN ARBOR, MI 48109		SCHOLARSHIP	SCHOLARSHIP	5,000.
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 77 MASSACHUSETTS AVENUE, 11-120 CAMBRIDGE, MA 02139		SCHOLARSHIP	SCHOLARSHIP	5,000.
FRAMINGHAM STATE UNIVERSITY 100 STATE STREET, PO BOX 9101 FRAMINGHAM, MA 01701		SCHOLARSHIP	SCHOLARSHIP	5,000.
NORTHEASTERN UNIVERSITY 354 RICHARDS HALL, 360 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
NEW YORK UNIVERSITY 383 LAFAYETTE STREET NEW YORK, NY 10003		SCHOLARSHIP	SCHOLARSHIP	2,500.
MASS COLLEGE OF PHARMACY 179 LONGWOOD AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
BRIGHAM YOUNG UNIVERSITY A-41 ASB PROVO, UT 84602		SCHOLARSHIP	SCHOLARSHIP	5,000.
TULANE UNIVERSITY 6823 SAINT CHARLES AVENUE NEW ORLEANS, LA 70118		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS BOSTON 100 WILLIAM T. MORRISEY BLVD, CAMPUS CTR, 4TH FL BOSTON, MA 02125		SCHOLARSHIP	SCHOLARSHIP	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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 recipient	Purpose of grant or contribution	Amount
BOSTON COLLEGE LYONS HALL, 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467		SCHOLARSHIP	SCHOLARSHIP	5,000.
BENTLEY UNIVERSITY 175 FOREST STREET WALTHAM, MA 02452		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MARYLAND 601 W. LOMBARD ST., SUITE 221 BALTIMORE, MD 21201		SCHOLARSHIP	SCHOLARSHIP	5,000.
LOYOLA UNIVERSITY OF CHICAGO SULLIVAN CTR FOR STUDENT SERVICES, 6339 N. SHERIDAN RD CHICAGO, IL 60660		SCHOLARSHIP	SCHOLARSHIP	5,000.
DELFT UNIVERSITY OF TECH IN NETHERLANDS BUILDING 30A, JAFFALAN 9A, 2628 BX DELFT, PO BOX 5, 2600 AA DELFT, NETHERLANDS		SCHOLARSHIP	SCHOLARSHIP	1,567.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF ROCHESTER PO BOX 270261 ROCHESTER, NY 14627		SCHOLARSHIP	SCHOLARSHIP	5,000.
BRYN MAWR COLLEGE BENHAM GATEWAY, 101 NORTH MERION AVENUE BRYN MAWR, PA 19010		SCHOLARSHIP	SCHOLARSHIP	5,000.
CASE WESTERN RESERVE UNIVERSITY P.O. BOX 614 CHESTERTON, IN 46304		SCHOLARSHIP	SCHOLARSHIP	5,000.
Total from continuation sheets				

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 4

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
23,080,291.	21,426,421.	0.	0.
			(F) GAIN OR LOSS
			1,653,870.
CAPITAL GAINS DIVIDENDS FROM PART IV			0.
TOTAL TO FORM 990-PF, PART I, LINE 6A			1,653,870.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 5

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENT	641,621.	0.	641,621.	553,552.	641,621.
TO PART I, LINE 4	641,621.	0.	641,621.	553,552.	641,621.

FORM 990-PF OTHER INCOME STATEMENT 6

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	11,042.	0.	
RENTAL FEES	2,450.	0.	
RETURNED GRANT FUNDS	25,000.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	38,492.	0.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	19,159.	1,915.	0.	17,244.	
TO FORM 990-PF, PG 1, LN 16B	19,159.	1,915.	0.	17,244.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OTHER PROFESSIONAL CONSULTANTS	15,743.	0.	0.	15,743.	
TO FORM 990-PF, PG 1, LN 16C	15,743.	0.	0.	15,743.	

FORM 990-PF	TAXES			STATEMENT	9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PAYROLL TAXES	14,418.	0.	0.	14,418.	
FEDERAL AND STATE TAXES	21,677.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	36,095.	0.	0.	14,418.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	10
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE EXPENSES	23,471.	0.	0.	23,471.	
FEDERAL EXCISE TAX BENEFIT	-49,532.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	-26,061.	0.	0.	23,471.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	11
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS		5,847,706.	5,847,706.
TOTAL TO FORM 990-PF, PART II, LINE 10C		5,847,706.	5,847,706.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	12
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	21,143,426.	21,143,426.
PRIVATE EQUITY FUNDS	COST	847,621.	847,621.
COMMODITIES	COST	844,811.	844,811.
TOTAL TO FORM 990-PF, PART II, LINE 13		22,835,858.	22,835,858.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	13
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER	2,684.	2,684.	0.
BUILDING	1,182,714.	206,974.	975,740.
OFFICE FURNITURE	23,912.	23,912.	0.
APPLIANCES	1,242.	1,242.	0.
MEETING FURNITURE	5,964.	5,964.	0.
WINDOW TREATMENTS	4,200.	4,200.	0.
OFFICE LAMPS	730.	730.	0.
INTERIOR DESIGN	1,500.	1,500.	0.
BABIN LANDSCAPING	2,570.	2,570.	0.
LAND	49,885.	0.	49,885.
IMAC COMPUTER	2,249.	2,249.	0.
MEETING ROOM WINDOW TREATMENTS	2,803.	1,121.	1,682.
COMPUTER	2,168.	1,734.	434.
COMPUTER	2,368.	947.	1,421.
COMPUTER	2,099.	420.	1,679.
LANDSCAPING	3,915.	392.	3,523.
TOTAL TO FM 990-PF, PART II, LN 14	1,291,003.	256,639.	1,034,364.

FORM 990-PF	OTHER ASSETS		STATEMENT 14
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DEFERRED EXCISE TAXES	0.	9,401.	9,401.
TO FORM 990-PF, PART II, LINE 15	0.	9,401.	9,401.

FORM 990-PF	OTHER LIABILITIES		STATEMENT 15
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
DEFERRED TAXES PAYABLE	40,131.	0.	
SCHOLARSHIPS PAYABLE	2,500.	0.	
TOTAL TO FORM 990-PF, PART II, LINE 22	42,631.	0.	

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS STATEMENT 16

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
BANK OF AMERICA MA1-225-04-02, 225 FRANKLIN STREET BOSTON, MA 02110	TRUSTEE 40.00	130,533.	0.	0.
MINER CRARY 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4.00	0.	0.	0.
STEPHEN RICHMOND 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4.00	0.	0.	0.
SUSAN IULIANO 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4.00	0.	0.	0.
JILL STANSKY 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE/CHAIR 8.00	0.	0.	0.

MARILYN MARTINO
326 CONCORD ROAD
SUDBURY, MA 01776

EXECUTIVE DIRECTOR

40.00

139,000.

10,050.

0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

269,533.

10,050.

0.

COPY

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 17

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARILYN MARTINO
326 CONCORD ROAD
SUDBURY, MA 01776

TELEPHONE NUMBER

978-443-0849

FORM AND CONTENT OF APPLICATIONS

APPLICATION FORMS ARE AVAILABLE ON OUR WEBSITE WWW.SUDBURYFOUNDATION.ORG
UNDER THE GRANT PROGRAMS TAB.

ANY SUBMISSION DEADLINES

PLEASE REFER TO OUR WEBSITE WWW.SUDBURYFOUNDATION.ORG UNDER THE GRANT
PROGRAMS TAB.

RESTRICTIONS AND LIMITATIONS ON AWARDS

PLEASE REFER TO OUR WEBSITE WWW.SUDBURYFOUNDATION.ORG UNDER THE GRANT
PROGRAMS TAB.

Application for Automatic Extension of Time To File an Exempt Organization Return

Department of the Treasury
Internal Revenue Service

▶ **File a separate application for each return.**
▶ **Go to www.irs.gov/Form8868 for the latest information.**

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

	Enter filer's identifying number	
Type or print	Name of exempt organization or other filer, see instructions. THE SUDBURY FOUNDATION	Employer identification number (EIN) or 04-6037026
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. 326 CONCORD RD	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SUDBURY, MA 01776	

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 | 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

BANK OF AMERICA PHIL. MGMT. GROUP

- The books are in the care of ▶ **225 FRANKLIN STREET, MA1-225-04-02 - BOSTON, MA 02110**
Telephone No. ▶ **(617) 434-6454** Fax No. ▶ _____
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 6-month extension of time until **NOVEMBER 15, 2019**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ calendar year **2018** or
▶ tax year beginning _____, and ending _____.

2 If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return
 Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	12,832.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	1,419.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	11,413.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.