

**Return of Private Foundation**

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

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**2021**

Open to Public Inspection

Form **990-PF**

Department of the Treasury  
Internal Revenue Service

For calendar year 2021 or tax year beginning

, and ending

Name of foundation <b>THE SUDBURY FOUNDATION</b>		A Employer identification number <b>04-6037026</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>326 CONCORD RD</b>	Room/suite	B Telephone number <b>978-443-0849</b>
City or town, state or province, country, and ZIP or foreign postal code <b>SUDBURY, MA 01776</b>		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) ▶ \$ <b>41,303,970.</b>	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ... <input type="checkbox"/>

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)
<b>Revenue</b>	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 .....	746,931.	733,761.		STATEMENT 5
	5a Gross rents .....				
	b Net rental income or (loss) .....				
	6a Net gain or (loss) from sale of assets not on line 10 .....	1,230,167.			STATEMENT 4
	b Gross sales price for all assets on line 6a .....	5,099,468.			
	7 Capital gain net income (from Part IV, line 2) .....		1,607,266.		
	8 Net short-term capital gain .....				
	9 Income modifications .....			5,000.	
	10a Gross sales less returns and allowances .....				
b Less: Cost of goods sold .....					
c Gross profit or (loss) .....					
11 Other income .....	4,918.	0.	0.	STATEMENT 6	
12 <b>Total.</b> Add lines 1 through 11 .....	1,982,016.	2,341,027.	5,000.		
<b>Operating and Administrative Expenses</b>	13 Compensation of officers, directors, trustees, etc. ....	308,200.	155,911.	0.	152,289.
	14 Other employee salaries and wages .....	65,475.	0.	0.	65,475.
	15 Pension plans, employee benefits .....	17,318.	0.	0.	17,318.
	16a Legal fees .....				
	b Accounting fees .....	19,487.	1,949.	0.	17,538.
	c Other professional fees .....	56,737.	0.	0.	56,737.
	17 Interest .....				
	18 Taxes .....	103,773.	0.	0.	16,071.
	19 Depreciation and depletion .....	31,133.	0.	0.	
	20 Occupancy .....	36,451.	0.	0.	36,451.
	21 Travel, conferences, and meetings .....	508.	0.	0.	508.
	22 Printing and publications .....				
	23 Other expenses .....	41,746.	0.	0.	41,746.
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 .....	680,828.	157,860.	0.	404,133.
	25 Contributions, gifts, grants paid .....	2,022,098.			1,601,098.
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25 .....	2,702,926.	157,860.	0.	2,005,231.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements .....	-720,910.				
b <b>Net investment income</b> (if negative, enter -0-) .....		2,183,167.			
c <b>Adjusted net income</b> (if negative, enter -0-) .....			5,000.		

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	6,478.	5,212.	5,212.	
	2 Savings and temporary cash investments	1,249,428.	960,531.	960,531.	
	3 Accounts receivable	14,848.			
	Less: allowance for doubtful accounts	5,091.	14,848.	14,848.	
	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		29,623.	29,623.	
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock				
	c Investments - corporate bonds	STMT 11	6,212,211.	7,073,043.	7,073,043.
	11 Investments - land, buildings, and equipment: basis				
Less: accumulated depreciation					
12 Investments - mortgage loans					
13 Investments - other	STMT 12	29,317,862.	32,313,235.	32,313,235.	
14 Land, buildings, and equipment: basis	1,291,003.				
Less: accumulated depreciation	STMT 13	483,525.	838,611.	807,478.	
15 Other assets (describe)	STATEMENT 14)	0.	100,000.	100,000.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		37,629,681.	41,303,970.	41,303,970.	
Liabilities	17 Accounts payable and accrued expenses	36,692.	78.		
	18 Grants payable	271,000.	687,000.		
	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)	51,856.	106,910.	
23 Total liabilities (add lines 17 through 22)		359,548.	793,988.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here	<input checked="" type="checkbox"/>			
	and complete lines 24, 25, 29, and 30.				
	24 Net assets without donor restrictions		37,270,133.	40,509,982.	
	25 Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here	<input type="checkbox"/>			
	and complete lines 26 through 30.				
	26 Capital stock, trust principal, or current funds				
	27 Paid-in or capital surplus, or land, bldg., and equipment fund				
28 Retained earnings, accumulated income, endowment, or other funds					
29 Total net assets or fund balances		37,270,133.	40,509,982.		
30 Total liabilities and net assets/fund balances		37,629,681.	41,303,970.		

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 29 (must agree with end-of-year figure reported on prior year's return)	1	37,270,133.
2 Enter amount from Part I, line 27a	2	-720,910.
3 Other increases not included in line 2 (itemize) UNREALIZED GAIN ON INVESTMENTS	3	3,960,759.
4 Add lines 1, 2, and 3	4	40,509,982.
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	40,509,982.

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>				
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 5,099,468.		3,492,202.	1,607,266.	
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			1,607,266.	
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 1,607,266.
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). See instructions. If (loss), enter -0- in Part I, line 8		{ If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8		3 N/A

**Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 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)		1	30,346.
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) 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	30,346.
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	30,346.
6 Credits/Payments:			
a 2021 estimated tax payments and 2020 overpayment credited to 2021	6a 60,000.		
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	60,000.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	31.
9 Tax due. If the total of lines 5 and 8 is more than 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	29,623.
11 Enter the amount of line 10 to be: Credited to 2022 estimated tax 29,623. Refunded		11	0.

**Part VI-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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>1b</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 <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
<b>1c</b> Did the foundation file <b>Form 1120-POL</b> for this year? .....		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ <u>0.</u> (2) On foundation managers. ▶ \$ <u>0.</u>		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>0.</u>		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? .....		X
If "Yes," attach a detailed description of the activities.		
<b>3</b> 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
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? .....		X
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? .....		N/A
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? .....		X
If "Yes," attach the statement required by <i>General Instruction T</i> .		
<b>6</b> 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
<b>7</b> 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 XIV .....	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ <u>MA</u>		
<b>b</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	
<b>9</b> 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 2021 or the tax year beginning in 2021? See the instructions for Part XIII. If "Yes," complete Part XIII .....		X
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses .....		X
<b>11</b> At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions .....	X	
<b>12</b> Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions .....		X
<b>13</b> Did the foundation comply with the public inspection requirements for its annual returns and exemption application? .....	X	
Website address ▶ <u>WWW.SUDBURYFOUNDATION.ORG</u>		
<b>14</b> The books are in care of ▶ <u>BANK OF AMERICA PHIL. MGMT. GROUP</u> Telephone no. ▶ <u>(617) 434-6454</u> Located at ▶ <u>225 FRANKLIN STREET, MA1-225-04-02, BOSTON, MA</u> ZIP+4 ▶ <u>02110</u>		
<b>15</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year .....	15	N/A
<b>16</b> At any time during calendar year 2021, 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? .....		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		

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

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

	Yes	No
<b>1a</b> 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? .....	1a(1)	X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .....	1a(2)	X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .....	1a(3)	X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .....	1a(4)	X
(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>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) .....	1a(5)	X
	1a(6)	X
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions .....	1b	X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here .....		
<b>d</b> 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 2021? .....	1d	X
<b>2</b> 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)):		
<b>a</b> At the end of tax year 2021, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2021? .....	2a	X
If "Yes," list the years ▶ _____, _____, _____, _____		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement - see instructions.) .....	2b	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ _____, _____, _____, _____		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? .....	3a	X
<b>b</b> If "Yes," did it have excess business holdings in 2021 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 2021.) .....	3b	N/A
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .....	4a	X
<b>b</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 2021? .....	4b	X

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

	Yes	No
<b>5a</b> 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))?		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?		X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions		X
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		X
<b>b</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	
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
<b>d</b> 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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A	
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		X
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	
<b>8</b> 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?		X

**Part VII 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		308,201.	11,422.	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	65,475.	4,910.	0.

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

**Part VII** 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 VIII-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 VIII-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 FIVE-YEAR UNSECURED LOAN TO A GRANTEE WITH A INTEREST RATE OF 0.75%.	100,000.
2	
All other program-related investments. See instructions.	
3	
	0.
<b>Total.</b> Add lines 1 through 3 .....	<b>100,000.</b>

**Part IX 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	38,551,298.
b	Average of monthly cash balances .....	1b	689,441.
c	Fair market value of all other assets (see instructions) .....	1c	5,845.
d	<b>Total</b> (add lines 1a, b, and c) .....	1d	39,246,584.
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	39,246,584.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	4	588,699.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	5	38,657,885.
6	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	6	1,932,894.

**Part X 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 IX, line 6 .....	1	1,932,894.
2a	Tax on investment income for 2021 from Part V, line 5 .....	2a	30,346.
b	Income tax for 2021. (This does not include the tax from Part V.) .....	2b	
c	Add lines 2a and 2b .....	2c	30,346.
3	Distributable amount before adjustments. Subtract line 2c from line 1 .....	3	1,902,548.
4	Recoveries of amounts treated as qualifying distributions .....	4	5,000.
5	Add lines 3 and 4 .....	5	1,907,548.
6	Deduction from distributable amount (see instructions) .....	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1 .....	7	1,907,548.

**Part XI 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	2,005,231.
b	Program-related investments - total from Part VIII-B .....	1b	100,000.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4 .....	4	2,105,231.

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**Part XII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				1,907,548.
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2021:				
a From 2016				
b From 2017				
c From 2018				
d From 2019		4,462.		
e From 2020		242,807.		
f Total of lines 3a through e	247,269.			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ \$	2,105,231.			
a Applied to 2020, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2021 distributable amount				1,907,548.
e Remaining amount distributed out of corpus	197,683.			
5 Excess distributions carryover applied to 2021 (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	444,952.			
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 2020. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2016 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a	444,952.			
10 Analysis of line 9:				
a Excess from 2017				
b Excess from 2018				
c Excess from 2019		4,462.		
d Excess from 2020		242,807.		
e Excess from 2021		197,683.		

**Part XIII Private Operating Foundations** (see instructions and Part VI-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 2021, 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) 2021	(b) 2020	(c) 2019	(d) 2018	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
<b>b</b> 85% (0.85) of line 2a					
<b>c</b> Qualifying distributions from Part XI, line 4, for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test - enter:					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed					
<b>c</b> "Support" alternative test - enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XIV 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 XIV** 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)				
<b>a Paid during the year</b>				
BETHANY HILL PLACE 89 BETHANY ROAD FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
BETHANY HILL PLACE 89 BETHANY ROAD FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
BIG BROTHERS BIG SISTERS OF CM/MW 484 MAIN STREET, SUITE 360 WORCESTER, MA 01608		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
BOYS & GIRLS CLUB OF ASSABET VALLEY 212 GREAT ROAD MAYNARD, MA 01754		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
BOYS & GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	200,000.
<b>Total</b> ..... <b>SEE CONTINUATION SHEET(S)</b> ..... ▶ <b>3a</b>				<b>2,017,098.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b> ..... ▶ <b>3b</b>				<b>0.</b>





**Part XIV** 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
CHICA PROJECT 1266 FURNACE BROOK PARKWAY QUINCY, MA 02169		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
DISCOVERING HIDDEN GEMS 446 MAIN STREET HUDSON, MA 01749		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
DISCOVERY MUSEUM 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	18,000.
DOC WAYNE YOUTH SERVICES, INC. 418 COMMONWEALTH AVENUE, ATTN: SANDY CADES BOSTON, MA 02215		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	150,000.
EMPLOYMENT OPTIONS, INC. 82 BRIGHAM STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
FAMILY PROMISE METROWEST 6 MULLIGAN STREET NATICK, MA 01760		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
FRAMINGHAM STATE UNIV. FOUNDATION 100 STATE STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	18,360.
HOOPS AND HOMEWORK PO BOX 5 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	17,920.
HOOPS AND HOMEWORK PO BOX 5 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	15,000.
JEFF'S PLACE 281 PLEASANT STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
<b>Total from continuation sheets</b>				<b>1,722,098.</b>

**Part XIV 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
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
MASSACHUSETTS AUDUBON SOCIETY 208 SOUTH GREAT ROAD LINCOLN, MA 01773		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
METROWEST YMCA 280 OLD CONNECTICUT PATH FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
ONE CAN HELP, INC. PO BOX 55 NEWTON, MA 02468		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	10,000.
REACH BEYOND DOMESTIC VIOLENCE P.O. BOX 540024 WALTHAM, MA 02454		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	15,930.
THE GUILD FOR HUMAN SERVICES 521 VIRGINIA ROAD CONCORD, MA 01742		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	19,130.
THE LEARNING CENTER FOR THE DEAF 848 CENTRAL STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	14,300.
THINKGIVE, INC. PO BOX 92 CONCORD, MA 01742		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	15,000.
THRIVE SUPPORT AND ADVOCACY, INC. 65 BOSTON POST ROAD WEST, SUITE 220 MARLBOROUGH, MA 01752		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
<b>Total from continuation sheets</b>				

**Part XIV 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
WAYSIDE YOUTH & FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
WILDFLOWER, INC. 271 LINCOLN STREET, SUITE 12 LEXINGTON, MA 02421		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	10,000.
A PLACE TO TURN 99 HARTFORD STREET NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	5,000.
ADVOCATES, INC. 1881 WORCESTER ROAD FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	5,000.
BETHANY HILL PLACE 89 BETHANY ROAD FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	4,300.
BOSTON AREA GLEANERS 91 MARTIN STREET ACTON, MA 01720		PUBLIC CHARITY	COMMUNITY	4,500.
CAMP CASCO PO BOX 330 SUDBURY, MA 01776		PUBLIC CHARITY	COMMUNITY	1,500.
CHARLES RIVER CENTER 59 E MILITIA HEIGHTS DRVIE NEEDHAM, MA 02492		PUBLIC CHARITY	COMMUNITY	5,000.
DISCOVERY MUSEUM 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	COMMUNITY	4,800.
DOC WAYNE YOUTH SERVICES, INC. 418 COMMONWEALTH AVENUE, ATTN: SANDY CADES BOSTON, MA 02215		PUBLIC CHARITY	COMMUNITY	5,000.
<b>Total from continuation sheets</b>				

**Part XIV 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
FAMILY PROMISE METROWEST 6 MULLIGAN STREET NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	5,000.
FRAMINGHAM HISTORY CENTER P.O. BOX 2032 FRAMINGHAM, MA 01703		PUBLIC CHARITY	COMMUNITY	5,000.
FRAMINGHAM POLICE DEPARTMENT 1 WILLIAM H. WELCH WAY FRAMINGHAM, MA 01702		MUNICIPALITY	COMMUNITY	5,000.
FRAMINGHAM STATE UNIV. FOUNDATION 100 STATE STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	3,000.
GREATER FRAMINGHAM COMMUNITY CHURCH 44 FRANKLIN STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	5,000.
GREATER FRAMINGHAM COMMUNITY CHURCH 44 FRANKLIN STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	5,000.
HOOPS AND HOMEWORK PO BOX 5 FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	2,500.
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	4,500.
MASSACHUSETTS AUDUBON SOCIETY 208 SOUTH GREAT ROAD LINCOLN, MA 01773		PUBLIC CHARITY	COMMUNITY	5,000.
METRO CDC 40 MECHANIC STREET, SUITE 300 MARLBOROUGH, MA 01752		PUBLIC CHARITY	COMMUNITY	4,000.
<b>Total from continuation sheets</b>				

**Part XIV 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
METROWEST LEGAL SERVICES 63 FOUNTAIN STREET, SUITE 304 FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	-2,500.
METROWEST NONPROFIT NETWORK P.O. BOX 1661 FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	10,000.
NATICK SERVICE COUNCIL 2 WEBSTER STREET NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	5,000.
NEIGHBOR BRIGADE PO BOX 735 MAYNARD, MA 01754		PUBLIC CHARITY	COMMUNITY	5,000.
PHILANTHROPY MASSACHUSETTS 133 FEDERAL STREET, SUITE 802 BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	5,100.
SOUTH MIDDLESEX OPPORTUNITY COUNCIL 7 BISHOP STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	5,000.
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	5,000.
THE LEARNING CENTER FOR THE DEAF 848 CENTRAL STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	5,000.
THRIVE SUPPORT AND ADVOCACY, INC. 65 BOSTON POST ROAD WEST, SUITE 220 MARLBOROUGH, MA 01752		PUBLIC CHARITY	COMMUNITY	4,500.
WAYSIDE YOUTH & FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	5,000.
<b>Total from continuation sheets</b>				

**Part XIV** 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 AREA GLEANERS 91 MARTIN STREET ACTON, MA 01720		PUBLIC CHARITY	FARM & LOCAL FOOD	25,000.
BOSTON AREA GLEANERS 91 MARTIN STREET ACTON, MA 01720		PUBLIC CHARITY	FARM & LOCAL FOOD	100,000.
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE ONE SUGARLOAF STREET SOUTH DEERFIELD, MA 01373		PUBLIC CHARITY	FARM & LOCAL FOOD	100,000.
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE ONE SUGARLOAF STREET SOUTH DEERFIELD, MA 01373		PUBLIC CHARITY	FARM & LOCAL FOOD	15,000.
GARDENING THE COMMUNITY PO BOX 90774 SPRINGFIELD, MA 01139		PUBLIC CHARITY	FARM & LOCAL FOOD	50,000.
LOVIN' SPOONFULS, INC. 1304 COMMONWEALTH AVENUE, SUITE E BOSTON, MA 02134		PUBLIC CHARITY	FARM & LOCAL FOOD	100,000.
METROWEST FOOD COLLABORATIVE 78 MAIN STREET HUDSON, MA 01749		PUBLIC CHARITY	FARM & LOCAL FOOD	5,000.
MILL CITY GROWS 650 SUFFOLK STREET, SUITE G10 LOWELL, MA 01854		PUBLIC CHARITY	FARM & LOCAL FOOD	50,000.
MILL CITY GROWS 650 SUFFOLK STREET, SUITE G10 LOWELL, MA 01854		PUBLIC CHARITY	FARM & LOCAL FOOD	15,000.
NEW ENTRY SUSTAINABLE FARMING PROJECT 733 CABOT STREET BEVERLY, MA 01915		PUBLIC CHARITY	FARM & LOCAL FOOD	50,000.
<b>Total from continuation sheets</b>				

**Part XIV** 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
REGIONAL ENVIRONMENTAL COUNCIL 9 CASTLE STREET, STE. 1 WORCESTER, MA 01610		PUBLIC CHARITY	FARM & LOCAL FOOD	100,000.
REGIONAL ENVIRONMENTAL COUNCIL 9 CASTLE STREET, STE. 1 WORCESTER, MA 01610		PUBLIC CHARITY	FARM & LOCAL FOOD	15,000.
FIRST PARISH OF SUDBURY 327 CONCORD ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	25,000.
GIFTS OF HOPE UNLIMITED PO BOX 338 SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	5,000.
GOODNOW LIBRARY FOUNDATION 21 CONCORD ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	15,000.
HOPESUDBURY PO BOX 802 SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	5,000.
LINCOLN-SUDBURY ADULT & COMMUNITY EDUCATION 390 LINCOLN ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	6,000.
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	2,500.
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	2,500.
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	-2,500.
<b>Total from continuation sheets</b>				

**Part XIV** 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
METROWEST FREE MEDICAL PROGRAM 105 HUDSON ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	5,000.
METROWEST READERS FEST 123 MOORE ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	1,000.
MUSICIANS OF THE OLD POST ROAD 107 CONCORD ROAD WAYLAND, MA 01778		PUBLIC CHARITY	SUDBURY	3,200.
NEIGHBOR BRIGADE PO BOX 735 MAYNARD, MA 01754		PUBLIC CHARITY	SUDBURY	5,000.
SMILE MASS, INC. 66 DUDLEY ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	14,750.
SUDBURY HISTORICAL SOCIETY 288 OLD SUDBURY ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	5,000.
SUDBURY VALLEY TRUSTEES 18 WOLBACH ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	10,000.
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	5,000.
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	1,140.
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	15,000.
<b>Total from continuation sheets</b>				

**Part XIV 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
AMERICAN INTERNATIONAL COLLEGE 1000 STATE STREET SPRINGFIELD, MA 01109		SCHOLARSHIP	SCHOLARSHIP	5,000.
AMHERST COLLEGE B-5 CONVERSE HALL, 100 BOLTWOOD AVENUE AMHERST, MA 01002		SCHOLARSHIP	SCHOLARSHIP	2,200.
ARIZONA STATE UNIVERSITY PO BOX 870412 TEMPE, AZ 85287		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE, 5TH FLOOR BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000.
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453		SCHOLARSHIP	SCHOLARSHIP	5,000.
CLEMSON UNIVERSITY G-01 SIKES HALL, BOX 345123 CLEMSON, SC 29634		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLBY COLLEGE 4800 MAYFLOWER HILL WATERVILLE, ME 04901		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLGATE UNIVERSITY 13 OAK DRIVE HAMILTON, NY 13346		SCHOLARSHIP	SCHOLARSHIP	5,000.
<b>Total from continuation sheets</b> .....				

**Part XIV 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
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLLEGE OF WILLIAM AND MARY PO BOX 8795 WILLIAMSBURG, VA 23185		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLUMBIA COLLEGE CHICAGO 600 S. MICHIGAN AVENUE, SUITE 303 CHICAGO, IL 60605		SCHOLARSHIP	SCHOLARSHIP	5,000.
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14851		SCHOLARSHIP	SCHOLARSHIP	6,668.
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14851		SCHOLARSHIP	SCHOLARSHIP	5,000.
CURRY COLLEGE 79C ATHERTON STREET MILTON, MA 02186		SCHOLARSHIP	SCHOLARSHIP	5,000.
ELON UNIVERSITY 2700 CAMPUS BOX ELON, NC 27244		SCHOLARSHIP	SCHOLARSHIP	5,000.
EMERSON COLLEGE 216 TREMONT STREET, 4TH FLOOR BOSTON, MA 02116		SCHOLARSHIP	SCHOLARSHIP	5,000.
EMORY UNIVERSITY 200 DOWMAN DRIVE, SUITE 300 ATLANTA, GA 30322		SCHOLARSHIP	SCHOLARSHIP	5,000.
<b>Total from continuation sheets</b>				

**Part XIV 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
GEORGETOWN UNIVERSITY G-19 HEALY HALL, BOX 571252, 3700 O ST, NW WASHINGTON, DC 20057		SCHOLARSHIP	SCHOLARSHIP	5,000.
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		SCHOLARSHIP	SCHOLARSHIP	5,000.
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		SCHOLARSHIP	SCHOLARSHIP	5,000.
ITHACA COLLEGE 953 DANBY ROAD ITHACA, NY 14850		SCHOLARSHIP	SCHOLARSHIP	5,000.
LOYOLA UNIVERSITY OF CHICAGO SULLIVAN CTR FOR STUDENT SERVICES, 6339 N. SHERIDAN RD CHICAGO, IL 60660		SCHOLARSHIP	SCHOLARSHIP	5,000.
MCGILL UNIVERSITY 3600 MCTAVISH STREET QUEBEC, CANADA H3A 0G3		SCHOLARSHIP	SCHOLARSHIP	5,000.
MERRIMACK COLLEGE AUSTIN 15B, 315 TURNPIKE STREET NORTH ANDOVER, MA 01845		SCHOLARSHIP	SCHOLARSHIP	5,000.
MORGAN STATE UNIVERSITY 1700 E. COLD SPRING LANE BALTIMORE, MD 21251		SCHOLARSHIP	SCHOLARSHIP	5,000.
MOUNT HOLYOKE COLLEGE 16 SKINNER HALL, 50 COLLEGE STREET SOUTH HADLEY, MA 01075		SCHOLARSHIP	SCHOLARSHIP	5,000.
NEW YORK UNIVERSITY 383 LAFAYETTE STREET NEW YORK, NY 10003		SCHOLARSHIP	SCHOLARSHIP	5,000.
<b>Total from continuation sheets</b> .....				

**Part XIV** 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
NORTHEASTERN UNIVERSITY 354 RICHARDS HALL, 360 HUNTINGTON AVE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
PURDUE UNIVERSITY 475 STADIUM MALL DRIVE WEST LAFAYETTE, IN 47907		SCHOLARSHIP	SCHOLARSHIP	5,000.
PURDUE UNIVERSITY 475 STADIUM MALL DRIVE WEST LAFAYETTE, IN 47907		SCHOLARSHIP	SCHOLARSHIP	5,000.
RICE UNIVERSITY 6100 MAIN STREET HOUSTON, TX 77251		SCHOLARSHIP	SCHOLARSHIP	5,000.
SALVE REGINA UNIVERSITY 100 OCHRE POINT AVENUE NEWPORT, RI 02840		SCHOLARSHIP	SCHOLARSHIP	5,000.
TULANE UNIVERSITY 205 SCIENCE AND ENGINEERING LAB COMPLEX NEW ORLEANS, LA 70118		SCHOLARSHIP	SCHOLARSHIP	5,000.
TULANE UNIVERSITY 6823 SAINT CHARLES AVENUE NEW ORLEANS, LA 70118		SCHOLARSHIP	SCHOLARSHIP	5,000.
TULANE UNIVERSITY 6823 ST. CHARLES AVENUE, BLDG. 14 NEW ORLEANS, LA 70118		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF CALIFORNIA SAN DIEGO 9500 GILMAN DRIVE, #1103 LA JOLLA, CA 92093		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK RD, UNIT 4116 STORRS, CT 06269-4116		SCHOLARSHIP	SCHOLARSHIP	5,000.
<b>Total from continuation sheets</b> .....				

**Part XIV** 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
UNIVERSITY OF CONNECTICUT 233 GLENBROOK ROAD, UNIT 4116 STORRS, CT 06269		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASS AMHERST 243 WHITMORE ADMINISTRATIVE BLDG. AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	2,500.
UNIVERSITY OF MASS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMINISTRATIVE BLDG. AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS BOSTON 100 WILLIAM T. MORRISEY BLVD, CAMPUS CTR, 4TH FL BOSTON, MA 02125		SCHOLARSHIP	SCHOLARSHIP	5,000.
<b>Total from continuation sheets</b>				

**Part XIV 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
UNIVERSITY OF MICHIGAN 2500 STUDENT ACTIVITIES BLDG., 515 E. JEFFERSON ST ANN ARBOR, MA 48109-1316		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF NEW HAMPSHIRE 11 GARRISON AVENUE, STOKE HALL DURHAM, NH 03824		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF RICHMOND QUEALLY CENTER, SUITE 214, 142 UR DRIVE RICHMOND, VA 23173		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF VERMONT 223 WATERMAN BUILDING BURLINGTON, VT 05405		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF VIRGINIA 1001 NORTH EMMET ST, PO BOX 400204 CHARLOTTESVILLE, VA 22903		SCHOLARSHIP	SCHOLARSHIP	5,000.
WELLESLEY COLLEGE 106 CENTRAL STREET WELLESLEY, MA 02481		SCHOLARSHIP	SCHOLARSHIP	5,000.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
WHEATON COLLEGE 26 E. MAIN STREET NORTON, MA 02766		SCHOLARSHIP	SCHOLARSHIP	5,000.
WOMEN IN FILM AND VIDEO NEW ENGLAND (WIFVNE) 86 LINCOLN STREET BOSTON, MA 02135		SCHOLARSHIP	SCHOLARSHIP	2,300.
<b>Total from continuation sheets</b> .....				

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.
5,099,468.	3,869,301.	0.	0.
(F) GAIN OR LOSS	1,230,167.		
CAPITAL GAINS DIVIDENDS FROM PART IV	0.		
TOTAL TO FORM 990-PF, PART I, LINE 6A	1,230,167.		

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	746,931.	0.	746,931.	733,761.	746,931.
TO PART I, LINE 4	746,931.	0.	746,931.	733,761.	746,931.

FORM 990-PF OTHER INCOME STATEMENT 6

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INVESTMENT INCOME	18.	0.	0.
RENTAL FEES	-100.	0.	0.
RETURNED GRANT FUNDS	5,000.	0.	0.
TOTAL TO FORM 990-PF, PART I, LINE 11	4,918.	0.	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	19,487.	1,949.	0.	17,538.	
TO FORM 990-PF, PG 1, LN 16B	19,487.	1,949.	0.	17,538.	

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	56,737.	0.	0.	56,737.	
TO FORM 990-PF, PG 1, LN 16C	56,737.	0.	0.	56,737.	

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	16,071.	0.	0.	16,071.	
FEDERAL EXCISE TAX EXPENSE	87,702.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	103,773.	0.	0.	16,071.	

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	41,746.	0.	0.	41,746.	
TO FORM 990-PF, PG 1, LN 23	41,746.	0.	0.	41,746.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	11
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS		7,073,043.	7,073,043.
TOTAL TO FORM 990-PF, PART II, LINE 10C		7,073,043.	7,073,043.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	12
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	29,320,199.	29,320,199.
PRIVATE EQUITY FUNDS	COST	2,251,618.	2,251,618.
COMMODITIES	COST	741,418.	741,418.
TOTAL TO FORM 990-PF, PART II, LINE 13		32,313,235.	32,313,235.

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.	428,731.	753,983.
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.	1,962.	841.
COMPUTER	2,168.	2,168.	0.
COMPUTER	2,368.	2,368.	0.
COMPUTER	2,099.	1,679.	420.
LANDSCAPING	3,915.	1,566.	2,349.
TOTAL TO FM 990-PF, PART II, LN 14	1,291,003.	483,525.	807,478.

FORM 990-PF	OTHER ASSETS		STATEMENT 14
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PROGRAM RELATED INVESTMENT	0.	100,000.	100,000.
TO FORM 990-PF, PART II, LINE 15	0.	100,000.	100,000.

FORM 990-PF	OTHER LIABILITIES		STATEMENT 15
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
DEFERRED EXCISE TAX LIABILITY	51,856.	106,910.	
TOTAL TO FORM 990-PF, PART II, LINE 22	51,856.	106,910.	

FORM 990-PF                      PART VII - 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	155,911.	0.	0.
MINER CRARY 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 (THRU DEC 2021) 326 CONCORD ROAD SUDBURY, MA 01776	EXECUTIVE DIRECTOR 40.00	152,290.	11,422.	0.
TRACY STEWART 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4.00	0.	0.	0.

BILL SPENCER  
326 CONCORD ROAD  
SUDBURY, MA 01776

TRUSTEE  
4.00

0.

0.

0.

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

308,201.

11,422.

0.

Copy

FORM 990-PF

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

STATEMENT 17

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

SONIA SHAH  
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](http://WWW.SUDBURYFOUNDATION.ORG)  
UNDER THE GRANT PROGRAMS TAB.

ANY SUBMISSION DEADLINES

PLEASE REFER TO OUR WEBSITE [WWW.SUDBURYFOUNDATION.ORG](http://WWW.SUDBURYFOUNDATION.ORG) UNDER THE GRANT  
PROGRAMS TAB.

RESTRICTIONS AND LIMITATIONS ON AWARDS

PLEASE REFER TO OUR WEBSITE [WWW.SUDBURYFOUNDATION.ORG](http://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](http://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](http://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.

<b>Type or print</b>	Name of exempt organization or other filer, see instructions.  <b>THE SUDBURY FOUNDATION</b>	Taxpayer identification number (TIN)  <b>04-6037026</b>
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. <b>326 CONCORD RD</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>SUDBURY, MA 01776</b>	

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 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
Form 990-T (corporation)	07		

**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 TINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until **NOVEMBER 15, 2022**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
▶  calendar year **2021** 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

<b>3a</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	0.
<b>b</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.	<b>3b</b>	\$	0.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

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