

Return of Private Foundation

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

2020

Open to Public Inspection

Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

For calendar year 2020 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) ▶ \$ 37,629,681.	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 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	496,037.	432,048.		STATEMENT 5
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	4,208,092.			STATEMENT 4
	b Gross sales price for all assets on line 6a	29,481,973.			
	7 Capital gain net income (from Part IV, line 2)		4,311,988.		
	8 Net short-term capital gain				
	9 Income modifications			143,807.	
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income	144,377.	0.	0.	STATEMENT 6	
12 Total. Add lines 1 through 11	4,848,506.	4,744,036.	143,807.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	272,068.	129,068.	0.	143,000.
	14 Other employee salaries and wages	63,600.	0.	0.	63,600.
	15 Pension plans, employee benefits	12,221.	0.	0.	12,221.
	16a Legal fees				
	b Accounting fees	18,854.	1,885.	0.	16,969.
	c Other professional fees	11,821.	0.	0.	11,821.
	17 Interest				
	18 Taxes	52,705.	0.	0.	15,476.
	19 Depreciation and depletion	176,507.	0.	0.	
	20 Occupancy	51,687.	0.	0.	51,687.
	21 Travel, conferences, and meetings	246.	0.	0.	246.
	22 Printing and publications				
	23 Other expenses	19,153.	0.	0.	19,153.
	24 Total operating and administrative expenses. Add lines 13 through 23	678,862.	130,953.	0.	334,173.
	25 Contributions, gifts, grants paid	1,323,313.			1,601,313.
26 Total expenses and disbursements. Add lines 24 and 25	2,002,175.	130,953.	0.	1,935,486.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	2,846,331.				
b Net investment income (if negative, enter -0-)		4,613,083.			
c Adjusted net income (if negative, enter -0-)			143,807.		

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		8,151.	6,478.	6,478.
	2	Savings and temporary cash investments		540,151.	1,249,428.	1,249,428.
	3	Accounts receivable	5,091.			
		Less: allowance for doubtful accounts		14,284.	5,091.	5,091.
	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		17,430.		
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock				
	c	Investments - corporate bonds	STMT 11	6,486,646.	6,212,211.	6,212,211.
	11	Investments - land, buildings, and equipment: basis				
	Less: accumulated depreciation					
12	Investments - mortgage loans					
13	Investments - other	STMT 12	27,220,315.	29,317,862.	29,317,862.	
14	Land, buildings, and equipment: basis	1,291,003.				
	Less: accumulated depreciation	STMT 13	452,392.	1,015,118.	838,611.	
15	Other assets (describe)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		35,302,095.	37,629,681.	37,629,681.	
Liabilities	17	Accounts payable and accrued expenses		4,443.	36,692.	
	18	Grants payable		549,000.	271,000.	
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe)	STATEMENT 14)	79,519.	51,856.	
23	Total liabilities (add lines 17 through 22)		632,962.	359,548.		
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		34,669,133.	37,270,133.	
	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		34,669,133.	37,270,133.		
30	Total liabilities and net assets/fund balances		35,302,095.	37,629,681.		

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	34,669,133.
2	Enter amount from Part I, line 27a	2	2,846,331.
3	Other increases not included in line 2 (itemize)	3	0.
4	Add lines 1, 2, and 3	4	37,515,464.
5	Decreases not included in line 2 (itemize) UNREALIZED LOSS ON INVESTMENTS	5	245,331.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	37,270,133.

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 29,481,973.		25,169,985.	4,311,988.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			4,311,988.
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	4,311,988.
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	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income
SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE.

1 Reserved	(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
Reserved				
Reserved				
Reserved				
Reserved				
Reserved				

2 Reserved	2	
3 Reserved	3	
4 Reserved	4	
5 Reserved	5	
6 Reserved	6	
7 Reserved	7	
8 Reserved	8	

Part VI 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)			
b Reserved		1	64,122.
c All other domestic foundations enter 1.39% 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	64,122.
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	64,122.
6 Credits/Payments:			
a 2020 estimated tax payments and 2019 overpayment credited to 2020	6a	51,430.	
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	51,430.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	493.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	13,185.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	
11 Enter the amount of line 10 to be: Credited to 2021 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>		11	

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 type="checkbox"/> \$ 0. (2) On foundation managers. <input 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 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 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 2020 or the tax year beginning in 2020? 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)

Table with 3 columns: Question, Yes, No. Rows 11-16. Row 11: 'At any time during the year, did the foundation, directly or indirectly, own a controlled entity...' Yes: , No: X. Row 12: 'Did the foundation make a distribution to a donor advised fund...' Yes: , No: X. Row 13: 'Did the foundation comply with the public inspection requirements...' Yes: X, No: . Row 14: 'The books are in care of...' Website address: WWW.SUDBURYFOUNDATION.ORG. Row 15: 'Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF...' Amount: 15, N/A. Row 16: 'At any time during calendar year 2020, 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?' Yes: , No: X.

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.

Table with 3 columns: Question, Yes, No. Rows 1a-4b. Row 1a: 'During the year, did the foundation (either directly or indirectly):' (1) Engage in the sale or exchange... Yes: , No: X. (2) Borrow money from, lend money to, or otherwise extend credit to... Yes: , No: X. (3) Furnish goods, services, or facilities to... Yes: , No: X. (4) Pay compensation to, or pay or reimburse the expenses of... Yes: X, No: . (5) Transfer any income or assets to a disqualified person... Yes: , No: X. (6) Agree to pay money or property to a government official... Yes: , No: X. Row 1b: 'If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions...' Yes: , No: X. Row 1c: 'Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts...' Yes: , No: X. Row 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)):' Row 2a: 'At the end of tax year 2020, did the foundation have any undistributed income...' Yes: , No: X. Row 2b: 'Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)...' Yes: , No: N/A. Row 2c: 'If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.' Row 3a: 'Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?' Yes: , No: X. Row 3b: 'If "Yes," did it have excess business holdings in 2020 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... (3) the lapse of the 10-, 15-, or 20-year first phase holding period?' Yes: , No: N/A. Row 4a: 'Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?' Yes: , No: X. Row 4b: '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 2020?' Yes: , No: X.

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 15		272,068.	10,725.	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	63,600.	4,770.	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	32,131,570.
b	Average of monthly cash balances	1b	614,490.
c	Fair market value of all other assets	1c	5,091.
d	Total (add lines 1a, b, and c)	1d	32,751,151.
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	32,751,151.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	491,267.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	32,259,884.
6	Minimum investment return. Enter 5% of line 5	6	1,612,994.

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	1,612,994.
2a	Tax on investment income for 2020 from Part VI, line 5	2a	64,122.
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	64,122.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,548,872.
4	Recoveries of amounts treated as qualifying distributions	4	143,807.
5	Add lines 3 and 4	5	1,692,679.
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	1,692,679.

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	1,935,486.
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	1,935,486.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,935,486.

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				1,692,679.
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2020:				
a From 2015				
b From 2016				
c From 2017				
d From 2018				
e From 2019	4,462.			
f Total of lines 3a through e	4,462.			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ 1,935,486.				
a Applied to 2019, 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 2020 distributable amount				1,692,679.
e Remaining amount distributed out of corpus	242,807.			
5 Excess distributions carryover applied to 2020 (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	247,269.			
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 2019. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2020. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2021				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 2015 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	247,269.			
10 Analysis of line 9:				
a Excess from 2016				
b Excess from 2017				
c Excess from 2018				
d Excess from 2019	4,462.			
e Excess from 2020	242,807.			

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 2020, 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) 2020	(b) 2019	(c) 2018	(d) 2017	
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 16

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				
ADVOCATES, INC. 1881 WORCESTER ROAD FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
BIG BROTHERS BIG SISTERS OF CM/MW 484 MAIN STREET, SUITE 360 WORCESTER, MA 01608		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
BIG BROTHERS BIG SISTERS OF CM/MW 484 MAIN STREET, SUITE 360 WORCESTER, MA 01608		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
BOYS & GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	100,000.
CAMP CASCO PO BOX 330 SUDBURY, MA 01776		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	16,700.
Total	SEE CONTINUATION SHEET(S)			1,323,313.
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
DISCOVERY MUSEUM 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
DOC WAYNE YOUTH SERVICES, INC. 418 COMMONWEALTH AVENUE, ATTN: SANDY CADES BOSTON, MA 02215		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
EMPLOYMENT OPTIONS, INC. 82 BRIGHAM STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
FAMILY PROMISE METROWEST 6 MULLIGAN STREET NATICK, MA 01760		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	10,000.
HOOPS AND HOMEWORK PO BOX 5 FRAMINGHAM, MA 01704		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	5,000.
HOOPS AND HOMEWORK PO BOX 5 FRAMINGHAM, MA 01704		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	15,300.
JEFF'S PLACE 281 PLEASANT STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
JEFF'S PLACE 281 PLEASANT STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	5,000.
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	10,000.
Total from continuation sheets				1,146,613.

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
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		MUNICIPALITY	CHILDREN, YOUTH & FAMILIES	9,060.
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		MUNICIPALITY	CHILDREN, YOUTH & FAMILIES	8,500.
METROWEST LEGAL SERVICES 63 FOUNTAIN STREET, SUITE 304 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	25,000.
METROWEST YMCA 280 OLD CONNECTICUT PATH FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	10,000.
METROWEST YMCA 280 OLD CONNECTICUT PATH FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	10,000.
ONE CAN HELP, INC. P.O. BOX 55 NEWTON, MA 02468		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	2,500.
ONE CAN HELP, INC. P.O. BOX 55 NEWTON, MA 02468		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	5,000.
SMILE MASS, INC. 66 DUDLEY ROAD SUDBURY, MA 01776		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	19,400.
SOUTH MIDDLESEX OPPORTUNITY COUNCIL 7 BISHOP STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	12,000.
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	24,000.
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
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	1,000.
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	8,035.
THE GUILD FOR HUMAN SERVICES 521 VIRGINIA ROAD CONCORD, MA 01742		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
THE LEARNING CENTER FOR THE DEAF 848 CENTRAL STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
THINKGIVE, INC. 26 ELM STREET CONCORD, MA 01742		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	18,000.
THRIVE SUPPORT AND ADVOCACY, INC. 65 BOSTON POST ROAD WEST, SUITE 220 MARLBOROUGH, MA 01752		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	20,000.
WAYSIDE YOUTH & FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM, MA 01701		PUBLIC CHARITY	CHILDREN, YOUTH & FAMILIES	10,000.
A PLACE TO TURN 99 HARTFORD STREET NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	2,500.
ACTON-BOXBOROUGH UNITED WAY 537 MASSACHUSETTS AVE, SUITE 101 ACTON, MA 01720		PUBLIC CHARITY	COMMUNITY	2,500.
ADVOCATES, INC. 1881 WORCESTER ROAD FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	2,500.
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
AMAZING THINGS ARTS CENTER 160 HOLLIS STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	2,500.
BETHANY HILL PLACE 89 BETHANY ROAD FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	2,500.
DISCOVERING HIDDEN GEMS 446 MAIN STREET HUDSON, MA 01749		PUBLIC CHARITY	COMMUNITY	2,500.
DISCOVERY MUSEUM 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	COMMUNITY	2,500.
DOC WAYNE YOUTH SERVICES, INC. 418 COMMONWEALTH AVENUE, ATTN: SANDY CADES BOSTON, MA 02215		PUBLIC CHARITY	COMMUNITY	2,500.
EDWARDS CHURCH/OPEN SPIRIT 39 EDWARDS STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	2,500.
FOUNDATION FOR METROWEST 3 ELIOT STREET NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	20,000.
FOUNDATION FOR METROWEST 3 ELIOT STREET NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	2,500.
FRAMINGHAM HISTORY CENTER P.O. BOX 2032 FRAMINGHAM, MA 01703		PUBLIC CHARITY	COMMUNITY	2,500.
FRAMINGHAM STATE UNIV. FOUNDATION 100 STATE STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	2,500.
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
FRIENDS OF THE ASSABET RIVER NATIONAL WILDLIFE REFUGE PO BOX 27 HUDSON, MA 01749		PUBLIC CHARITY	COMMUNITY	2,500.
GREATER FRAMINGHAM COMMUNITY CHURCH 44 FRANKLIN STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	2,500.
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	2,500.
LINCOLN METCO COORDINATING COMMITTEE PO BOX 393 LINCOLN, MA 01773		PUBLIC CHARITY	COMMUNITY	2,500.
METRO CDC 40 MECHANIC STREET, SUITE 300 MARLBOROUGH, MA 01752		PUBLIC CHARITY	COMMUNITY	2,500.
METROWEST LEGAL SERVICES 63 FOUNTAIN STREET, SUITE 304 FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	2,500.
METROWEST MEDIATION SERVICES 220 NORTH MAIN STREET, SUITE 106 NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	2,500.
METROWEST NONPROFIT NETWORK P.O. BOX 1661 FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	10,000.
METROWEST NONPROFIT NETWORK P.O. BOX 1661 FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	2,500.
METROWEST YMCA 280 OLD CONNECTICUT PATH FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	2,500.
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
NEIGHBOR BRIGADE PO BOX 735 MAYNARD, MA 01754		PUBLIC CHARITY	COMMUNITY	2,500.
OUT METROWEST PO BOX 2122 FRAMINGHAM, MA 01703		PUBLIC CHARITY	COMMUNITY	1,500.
PHILANTHROPY MASSACHUSETTS 133 FEDERAL STREET, SUITE 802 BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	5,000.
PHILANTHROPY MASSACHUSETTS 133 FEDERAL STREET, SUITE 802 BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	5,000.
REACH BEYOND DOMESTIC VIOLENCE P.O. BOX 540024 WALTHAM, MA 02454		PUBLIC CHARITY	COMMUNITY	2,500.
SOUTH MIDDLESEX OPPORTUNITY COUNCIL 7 BISHOP STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	COMMUNITY	2,500.
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PUBLIC CHARITY	COMMUNITY	2,500.
SUDBURY PUBLIC SCHOOLS 40 FAIRBANK ROAD SUDBURY, MA 01776		MUNICIPALITY	COMMUNITY	2,500.
THE LEARNING CENTER FOR THE DEAF 848 CENTRAL STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	COMMUNITY	2,500.
BOSTON AREA GLEANERS 240 BEAVER STREET WALTHAM, MA 02452		PUBLIC CHARITY	FARM & LOCAL FOOD	25,000.
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 AREA GLEANERS 240 BEAVER STREET WALTHAM, MA 02452		PUBLIC CHARITY	FARM & LOCAL FOOD	15,000.
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE ONE SUGARLOAF STREET S. DEERFIELD, MA 01373		PUBLIC CHARITY	FARM & LOCAL FOOD	15,000.
MASS FOOD SYSTEM COLLABORATIVE 324 WELLS STREET GREENFIELD, MA 01301		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	25,000.
NEW ENTRY SUSTAINABLE FARMING PROJECT 733 CABOT STREET BEVERLY, MA 01915		PUBLIC CHARITY	FARM & LOCAL FOOD	15,000.
REGIONAL ENVIRNOMENTAL COUNCIL PO BOX 255 WORCESTER, MA 01613		PUBLIC CHARITY	FARM & LOCAL FOOD	15,000.
THE CARROT PROJECT 89 SOUTH STREET, 7TH FLOOR BOSTON, MA 02111		PUBLIC CHARITY	FARM & LOCAL FOOD	100,000.
FRESH START FURNITURE BANK 16 BRENT DRIVE HUDSON, MA 01749		PUBLIC CHARITY	SUDBURY	15,000.
HOPESUDBURY PO BOX 802 SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	6,500.
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
LINCOLN SUDBURY PARENT ORGANIZATION 390 LINCOLN ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	7,200.
NEIGHBOR BRIGADE PO BOX 735 MAYNARD, MA 01754		PUBLIC CHARITY	SUDBURY	9,000.
ORGANIZATION FOR THE ASSABET, SUDBURY & CONCORD RIVERS 23 BRADFORD STREET CONCORD, MA 01742		PUBLIC CHARITY	SUDBURY	10,000.
SUDBURY HOUSING AUTHORITY 55 HUDSON ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	50,000.
SUDBURY VALLEY TRUSTEES 18 WOLBACH ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	5,000.
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.
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453		SCHOLARSHIP	SCHOLARSHIP	5,000.
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		SCHOLARSHIP	SCHOLARSHIP	5,000.
OHIO STATE UNIVERSITY BRICKER HALL, 190 NORTH OVAL MALL COLUMBUS, OH 43210		SCHOLARSHIP	SCHOLARSHIP	1,000.
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
CLEMSON UNIVERSITY G-01 SIKES HALL, BOX 345123 CLEMSON, SC 29634		SCHOLARSHIP	SCHOLARSHIP	5,000.
MERRIMACK COLLEGE AUSTIN 15B, 315 TURNPIKE STREET NORTH ANDOVER, MA 01845		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF RHODE ISLAND 45 UPPER COLLEGE ROAD KINGSTON, RI 02881		SCHOLARSHIP	SCHOLARSHIP	1,000.
ITHACA COLLEGE 953 DANBY ROAD ITHACA, NY 14850		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		SCHOLARSHIP	SCHOLARSHIP	1,000.
UNIVERSITY OF MASS AMHERST 243 WHITMORE ADMINISTRATIVE BLDG. AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLLEGE OF WILLIAM AND MARY PO BOX 8795 WILLIAMSBURG, VA 23185		SCHOLARSHIP	SCHOLARSHIP	5,000.
MIAMI UNIVERSITY OF OHIO 301 S. CAMPUS AVENUE OXFORD, OH 45056		SCHOLARSHIP	SCHOLARSHIP	5,000.
WESTFIELD STATE UNIVERSITY 577 WESTERN AVENUE WESTFIELD, MA 01085		SCHOLARSHIP	SCHOLARSHIP	1,000.
NORTHEASTERN UNIVERSITY 354 RICHARDS HALL, 360 HUNTINGTON AVE BOSTON, MA 02115		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
MOUNT HOLYOKE COLLEGE 16 SKINNER HALL, 50 COLLEGE STREET SOUTH HADLEY, MA 01075		SCHOLARSHIP	SCHOLARSHIP	5,000.
BOWDOIN COLLEGE 5300 COLLEGE STATION BRUNSWICK, ME 04011		SCHOLARSHIP	SCHOLARSHIP	5,000.
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		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.
MIDDLEBURY COLLEGE 84 SOUTH SERVICE ROAD MIDDLEBURY, VT 05753		SCHOLARSHIP	SCHOLARSHIP	2,500.
HOFSTRA UNIVERSITY 200 MEMORIAL HALL, ROOM 206 HEMPSTEAD, NY 11549		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK RD, UNIT 4116 STORRS, CT 06269-4116		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
EMERSON COLLEGE 120 BOYLSTON STREET BOSTON, MA 02116		SCHOLARSHIP	SCHOLARSHIP	1,000.
EMORY UNIVERSITY 200 DOWMAN DRIVE, SUITE 300 ATLANTA, GA 30322		SCHOLARSHIP	SCHOLARSHIP	5,000.
GEORGETOWN UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		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 RICHMOND QUEALLY CENTER, SUITE 214, 142 UR DRIVE RICHMOND, VA 23173		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MICHIGAN 2500 STUDENT ACTIVITIES BLDG., 515 E. JEFFERSON ST ANN ARBOR, MA 48109-1316		SCHOLARSHIP	SCHOLARSHIP	5,000.
MCGILL UNIVERSITY 3600 MCTAVISH STREET MONTREAL, QUEBEC, CANADA, MONTREAL, CANADA H3A 0G3		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK RD, UNIT 4116 STORRS, CT 06269-4116		SCHOLARSHIP	SCHOLARSHIP	1,000.
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
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLBY COLLEGE 4800 MAYFLOWER HILL WATERVILLE, ME 04901		SCHOLARSHIP	SCHOLARSHIP	5,000.
WHEATON COLLEGE 26 E. MAIN STREET NORTON, MA 02766		SCHOLARSHIP	SCHOLARSHIP	5,000.
AMERICAN INTERNATIONAL COLLEGE 1000 STATE STREET SPRINGFIELD, MA 01109		SCHOLARSHIP	SCHOLARSHIP	5,000.
ELON UNIVERSITY 2700 CAMPUS BOX ELON, NC 27244		SCHOLARSHIP	SCHOLARSHIP	5,000.
EMERSON COLLEGE 120 BOYLSTON STREET BOSTON, MA 02116		SCHOLARSHIP	SCHOLARSHIP	5,000.
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14850		SCHOLARSHIP	SCHOLARSHIP	5,000.
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.
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
UNIVERSITY OF NEW HAMPSHIRE 105 MAIN STREET DURHAM, NH 03824		SCHOLARSHIP	SCHOLARSHIP	5,000.
NEW YORK UNIVERSITY 383 LAFAYETTE STREET NEW YORK, NY 10003		SCHOLARSHIP	SCHOLARSHIP	5,000.
MASS COLLEGE OF PHARMACY 179 LONGWOOD AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	2,500.
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14851		SCHOLARSHIP	SCHOLARSHIP	6,666.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		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.
COLGATE UNIVERSITY 13 OAK DRIVE HAMILTON, NY 13346		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS BOSTON 100 WILLIAM T. MORRISEY BLVD, CAMPUS CTR, 4TH FL BOSTON, MA 02125		SCHOLARSHIP	SCHOLARSHIP	1,931.
SALVE REGINA UNIVERSITY 100 OCHRE POINT AVENUE NEWPORT, RI 02840		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
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.
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14851		SCHOLARSHIP	SCHOLARSHIP	5,000.
TULANE UNIVERSITY 6823 ST. CHARLES AVENUE, BLDG. 14 NEW ORLEANS, LA 70118		SCHOLARSHIP	SCHOLARSHIP	5,000.
DELFT UNIVERSITY OF TECH IN NETHERLANDS BUILDING 30A, JAFFALAN 9A, 2628 BX DELFT, PO BOX 5, 2600 AA DELFT, NETHERLANDS, DELFT, NETHERLANDS		SCHOLARSHIP	SCHOLARSHIP	2,521.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK ROAD, UNIT 4116 STORRS, CT 06269		SCHOLARSHIP	SCHOLARSHIP	5,000.
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		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.
29,481,973.	25,273,881.	0.	0.
(F) GAIN OR LOSS	4,208,092.		
CAPITAL GAINS DIVIDENDS FROM PART IV	0.		
TOTAL TO FORM 990-PF, PART I, LINE 6A	4,208,092.		

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	496,037.	0.	496,037.	432,048.	496,037.
TO PART I, LINE 4	496,037.	0.	496,037.	432,048.	496,037.

FORM 990-PF OTHER INCOME STATEMENT 6

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INVESTMENT INCOME	270.	0.	
RENTAL FEES	300.	0.	
RETURNED GRANT FUNDS	143,807.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	144,377.	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	18,854.	1,885.	0.	16,969.	
TO FORM 990-PF, PG 1, LN 16B	18,854.	1,885.	0.	16,969.	

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	11,821.	0.	0.	11,821.	
TO FORM 990-PF, PG 1, LN 16C	11,821.	0.	0.	11,821.	

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	15,476.	0.	0.	15,476.	
FEDERAL EXCISE TAX EXPENSE	37,229.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	52,705.	0.	0.	15,476.	

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	19,153.	0.	0.	19,153.	
TO FORM 990-PF, PG 1, LN 23	19,153.	0.	0.	19,153.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	11
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS		6,212,211.	6,212,211.
TOTAL TO FORM 990-PF, PART II, LINE 10C		6,212,211.	6,212,211.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	12
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	27,172,683.	27,172,683.
PRIVATE EQUITY FUNDS	COST	1,405,385.	1,405,385.
COMMODITIES	COST	739,794.	739,794.
TOTAL TO FORM 990-PF, PART II, LINE 13		29,317,862.	29,317,862.

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.	399,165.	783,549.
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.	1,680.	1,123.
COMPUTER	2,168.	2,168.	0.
COMPUTER	2,368.	1,894.	474.
COMPUTER	2,099.	1,259.	840.
LANDSCAPING	3,915.	1,175.	2,740.
TOTAL TO FM 990-PF, PART II, LN 14	1,291,003.	452,392.	838,611.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	14
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
DEFERRED EXCISE TAX LIABILITY	79,519.	51,856.	
TOTAL TO FORM 990-PF, PART II, LINE 22	79,519.	51,856.	

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS STATEMENT 15

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	129,068.	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 (THRU JAN 2020) 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	143,000.	10,725.	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 VIII		272,068.	10,725.	0.

FORM 990-PF

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

STATEMENT 16

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.

Type or print	Name of exempt organization or other filer, see instructions. THE SUDBURY FOUNDATION	Taxpayer identification number (TIN) 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	
	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 TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until **NOVEMBER 15, 2021**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ calendar year **2020** 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	\$	0.
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	\$	17,430.
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	\$	0.

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.