

Return of Private Foundation

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

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2022

Open to Public Inspection

Form **990-PF**

Department of the Treasury
Internal Revenue Service

For calendar year 2022 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) \$ 32,987,532.	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)
Revenue	1 Contributions, gifts, grants, etc., received	1,815.			
	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	574,572.	563,795.		STATEMENT 6
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	63,326.			STATEMENT 5
	b Gross sales price for all assets on line 6a 6,855,492.				
	7 Capital gain net income (from Part IV, line 2)		244,214.		
	8 Net short-term capital gain				
	9 Income modifications			4,843.	
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income	7,281.	750.	0.	STATEMENT 7	
12 Total. Add lines 1 through 11	646,994.	808,759.	4,843.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	276,162.	143,974.	0.	132,188.
	14 Other employee salaries and wages	85,522.	0.	0.	85,522.
	15 Pension plans, employee benefits	36,484.	0.	0.	36,484.
	16a Legal fees				
	b Accounting fees STMT 8	20,405.	2,041.	0.	18,364.
	c Other professional fees STMT 9	14,800.	0.	0.	14,800.
	17 Interest				
	18 Taxes STMT 10	26,109.	0.	0.	16,127.
	19 Depreciation and depletion	32,861.	0.	0.	
	20 Occupancy	43,194.	0.	0.	43,194.
	21 Travel, conferences, and meetings	2,217.	0.	0.	0.
	22 Printing and publications				
	23 Other expenses STMT 11	35,103.	0.	0.	35,103.
	24 Total operating and administrative expenses. Add lines 13 through 23	572,857.	146,015.	0.	381,782.
	25 Contributions, gifts, grants paid	1,148,485.			1,623,642.
26 Total expenses and disbursements. Add lines 24 and 25	1,721,342.	146,015.	0.	2,005,424.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements ...	-1,074,348.				
b Net investment income (if negative, enter -0-)		662,744.			
c Adjusted net income (if negative, enter -0-)			4,843.		

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	5,212.	18,315.	18,315.	
	2 Savings and temporary cash investments	960,531.	543,687.	543,687.	
	3 Accounts receivable	11,771.			
	Less: allowance for doubtful accounts	14,848.	11,771.	11,771.	
	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.	40,411.	40,411.	
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock				
	c Investments - corporate bonds	STMT 12	7,073,043.	8,178,315.	8,178,315.
	11 Investments - land, buildings, and equipment: basis				
Less: accumulated depreciation					
12 Investments - mortgage loans					
13 Investments - other	STMT 13	32,313,235.	23,202,111.	23,202,111.	
14 Land, buildings, and equipment: basis	1,309,308.				
Less: accumulated depreciation	STMT 14	516,386.	807,478.	792,922.	
15 Other assets (describe STATEMENT 15)		100,000.	200,000.	200,000.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		41,303,970.	32,987,532.	32,987,532.	
Liabilities	17 Accounts payable and accrued expenses	78.			
	18 Grants payable	687,000.	207,000.		
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe STATEMENT 16)		106,910.	12,918.	
23 Total liabilities (add lines 17 through 22)		793,988.	219,918.		
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		40,509,982.	32,767,614.	
	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		40,509,982.	32,767,614.		
30 Total liabilities and net assets/fund balances		41,303,970.	32,987,532.		

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	40,509,982.
2 Enter amount from Part I, line 27a	2	-1,074,348.
3 Other increases not included in line 2 (itemize) CHANGE IN DEFERRED TAX EXPENSE	3	93,992.
4 Add lines 1, 2, and 3	4	39,529,626.
5 Decreases not included in line 2 (itemize) UNREALIZED LOSS ON INVESTMENTS	5	6,762,012.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	32,767,614.

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 6,855,492.		6,611,278.	244,214.	
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			244,214.	
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 }		2 244,214.
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 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	9,212.
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	9,212.
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	9,212.
6 Credits/Payments:			
a 2022 estimated tax payments and 2021 overpayment credited to 2022	6a 49,623.		
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	49,623.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	0.
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	40,411.
11 Enter the amount of line 10 to be: Credited to 2023 estimated tax 40,411. Refunded		11	0.

Part VI-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. \$ <u>0.</u> (2) On foundation managers. \$ <u>0.</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ <u>0.</u>		
2 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.		
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?		X
If "Yes," attach the statement required by <i>General Instruction T</i> .		
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 XIV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. _____ MA		
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 2022 or the tax year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	X	
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address WWW.SUDBURYFOUNDATION.ORG		
14 The books are in care of BANK OF AMERICA PHIL. MGMT. GROUP Telephone no. (617) 434-6454 Located at 225 FRANKLIN STREET, MA1-225-04-02, BOSTON, MA ZIP+4 02110		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year		N/A
16 At any time during calendar year 2022, 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
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	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)?	1a(5)	X
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)	X
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	X
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
d 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 2022?	1d	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?	2a	X
If "Yes," list the years _____, _____, _____, _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. _____, _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	X
b If "Yes," did it have excess business holdings in 2022 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 2022.)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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 2022?	4b	X

Form 990-PF (2022)

Part VI-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))?		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 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	
c Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
d 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	
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
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
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	
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?		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 17		276,162.	9,703.	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	70,000.	5,250.	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 1%.	100,000.
2	0.
All other program-related investments. See instructions.	
3	0.
Total. Add lines 1 through 3	100,000.

Form 990-PF (2022)

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	33,871,937.
b	Average of monthly cash balances	1b	654,903.
c	Fair market value of all other assets (see instructions)	1c	11,764.
d	Total (add lines 1a, b, and c)	1d	34,538,604.
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	34,538,604.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	518,079.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	34,020,525.
6	Minimum investment return. Enter 5% (0.05) of line 5	6	1,701,026.

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	1,701,026.
2a	Tax on investment income for 2022 from Part V, line 5	2a	9,212.
b	Income tax for 2022. (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	9,212.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,691,814.
4	Recoveries of amounts treated as qualifying distributions	4	4,843.
5	Add lines 3 and 4	5	1,696,657.
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 XII, line 1	7	1,696,657.

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	2,005,424.
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	2,105,424.

Form 990-PF (2022)

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				1,696,657.
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2022:				
a From 2017				
b From 2018				
c From 2019		4,462.		
d From 2020		242,807.		
e From 2021		197,683.		
f Total of lines 3a through e	444,952.			
4 Qualifying distributions for 2022 from Part XI, line 4: \$ 2,105,424.				
a Applied to 2021, 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 2022 distributable amount				1,696,657.
e Remaining amount distributed out of corpus	408,767.			
5 Excess distributions carryover applied to 2022 (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	853,719.			
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 2021. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				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 2017 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a	853,719.			
10 Analysis of line 9:				
a Excess from 2018				
b Excess from 2019		4,462.		
c Excess from 2020		242,807.		
d Excess from 2021		197,683.		
e Excess from 2022		408,767.		

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 2022, 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) 2022	(b) 2021	(c) 2020	(d) 2019	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed _____					
b 85% (0.85) of line 2a _____					
c Qualifying distributions from Part XI, 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 IX, 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 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 18
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)				
a Paid during the year				
ACTON-BOXBOROUGH UNITED WAY 525 MASSACHUSETTS AVE., SUITE 203 ACTON, MA 01720		PC	COMMUNITY	5,000.
ADVOCATES, INC. 1881 WORCESTER ROAD FRAMINGHAM, MA 01701		PC	COMMUNITY	5,000.
AMAZING THINGS ARTS CENTER 160 HOLLIS STREET FRAMINGHAM, MA 01702		PC	COMMUNITY	5,000.
AMHERST COLLEGE B-5 CONVERSE HALL, 100 BOLTWOOD AVENUE AMHERST, MA 01002		PC	SCHOLARSHIP	1,100.
AMHERST COLLEGE B-5 CONVERSE HALL, 100 BOLTWOOD AVENUE AMHERST, MA 01002		PC	SCHOLARSHIP	1,100.
Total	SEE CONTINUATION SHEET(S)			3a 1,628,485.
b Approved for future payment				
NONE				
Total				3b 0.

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	574,572.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					1,588.
8 Gain or (loss) from sales of assets other than inventory			18	63,326.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a RENTAL FEES					850.
b RETURNED GRANT FUNDS					4,843.
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e)		0.		637,898.	7,281.
13 Total. Add line 12, columns (b), (d), and (e)					13 645,179.

(See worksheet in line 13 instructions to verify calculations.)

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No.	Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
11A	GRANGE RENTAL FEES FOR COMMUNITY GROUPS
11B	EXCESS FUNDS RETURNED FROM GRANTS PREVIOUSLY PAID OUT.

Part XVI Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
a Transfers from the reporting foundation to a noncharitable exempt organization of:
(1) Cash
(2) Other assets
b Other transactions:
(1) Sales of assets to a noncharitable exempt organization
(2) Purchases of assets from a noncharitable exempt organization
(3) Rental of facilities, equipment, or other assets
(4) Reimbursement arrangements
(5) Loans or loan guarantees
(6) Performance of services or membership or fundraising solicitations
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

Table with 4 columns: (a) Line no., (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements. All entries are N/A.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? Yes No

b If "Yes," complete the following schedule. Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship. All entries are N/A.

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge. Signature of officer or trustee, Date, Title: TRUSTEE

May the IRS discuss this return with the preparer shown below? See instr. [X] Yes [] No

Paid Preparer Use Only Print/Type preparer's name: COURTNEY MCFARLAND, CPA; Preparer's signature: COURTNEY MCFARLAN; Date: 07/13/23; Check self-employed; PTIN: P01645518; Firm's name: AAFCPAS, INC.; Firm's EIN: 04-2571780; Firm's address: 50 WASHINGTON STREET, WESTBOROUGH, MA 01581; Phone no.: 508-366-9100

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
AMHERST COLLEGE B-5 CONVERSE HALL, 100 BOLTWOOD AVENUE AMHERST, MA 01002		PC	SCHOLARSHIP	900.
AMHERST COLLEGE B-5 CONVERSE HALL, 100 BOLTWOOD AVENUE AMHERST, MA 01002		PC	SCHOLARSHIP	900.
ARIZONA STATE UNIVERSITY PO BOX 870412 TEMPE, AZ 85287		PC	SCHOLARSHIP	2,500.
ARIZONA STATE UNIVERSITY PO BOX 870412 TEMPE, AZ 85287		PC	SCHOLARSHIP	2,500.
BETHANY HILL PLACE 89 BETHANY ROAD FRAMINGHAM, MA 01702		PC	CHILDREN, YOUTH & FAMILIES	20,000.
BIG BROTHERS BIG SISTERS OF CM/MW 18 CHESTNUT STREET, SUITE 340 WORCESTER, MA 01608		PC	CHILDREN, YOUTH & FAMILIES	25,000.
BOSTON AREA GLEANERS 91 MARTIN STREET ACTON, MA 01720		PC	FARM & LOCAL FOOD	33,000.
BOSTON AREA GLEANERS 91 MARTIN STREET ACTON, MA 01720		PC	COMMUNITY	5,000.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE, 5TH FLOOR BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				1,611,285.

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 UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE, 5TH FLOOR BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		PC	SCHOLARSHIP	2,500.
BOYS & GIRLS CLUB OF ASSABET VALLEY 212 GREAT ROAD MAYNARD, MA 01754		PC	CHILDREN, YOUTH & FAMILIES	20,000.
BOYS & GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBOROUGH, MA 01752		PC	CHILDREN, YOUTH & FAMILIES	100,000.
CHARLES RIVER CENTER 59 E MILITIA HEIGHTS DRIVE NEEDHAM, MA 02492		PC	COMMUNITY	5,000.
CHICA PROJECT 1266 FURNACE BROOK PARKWAY QUINCY, MA 02169		PC	CHILDREN, YOUTH & FAMILIES	20,000.
Total from continuation sheets				

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		PC	COMMUNITY	5,000.
COLBY COLLEGE 4800 MAYFLOWER HILL WATERVILLE, ME 04901		PC	SCHOLARSHIP	2,500.
COLBY COLLEGE 4800 MAYFLOWER HILL WATERVILLE, ME 04901		PC	SCHOLARSHIP	2,500.
COLGATE UNIVERSITY 13 OAK DRIVE HAMILTON, NY 13346		PC	SCHOLARSHIP	2,500.
COLGATE UNIVERSITY 13 OAK DRIVE HAMILTON, NY 13346		PC	SCHOLARSHIP	2,500.
COLGATE UNIVERSITY 13 OAK DRIVE HAMILTON, NY 13346		PC	SCHOLARSHIP	2,500.
COLGATE UNIVERSITY 13 OAK DRIVE HAMILTON, NY 13346		PC	SCHOLARSHIP	2,500.
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		PC	SCHOLARSHIP	2,500.
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		PC	SCHOLARSHIP	2,500.
COLLEGE OF THE HOLY CROSS ONE COLLEGE STREET WORCESTER, MA 01610		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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		PC	SCHOLARSHIP	2,500.
COLLEGE OF WILLIAM AND MARY PO BOX 8795 WILLIAMSBURG, VA 23185		PC	SCHOLARSHIP	2,500.
COLLEGE OF WILLIAM AND MARY PO BOX 8795 WILLIAMSBURG, VA 23185		PC	SCHOLARSHIP	2,500.
COLLEGE OF WILLIAM AND MARY PO BOX 8795 WILLIAMSBURG, VA 23185		PC	SCHOLARSHIP	2,500.
COLUMBIA COLLEGE CHICAGO 600 S. MICHIGAN AVENUE, SUITE 303 CHICAGO, IL 60605		PC	SCHOLARSHIP	2,500.
COLUMBIA COLLEGE CHICAGO 600 S. MICHIGAN AVENUE, SUITE 303 CHICAGO, IL 60605		PC	SCHOLARSHIP	2,500.
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE ONE SUGARLOAF STREET SOUTH DEERFIELD, MA 01373		PC	FARM & LOCAL FOOD	33,000.
CONNECTICUT COLLEGE 270 MOHEGAN AVENUE NEW LONDON, CT 06320		PC	SCHOLARSHIP	2,500.
CONNECTICUT COLLEGE 270 MOHEGAN AVENUE NEW LONDON, CT 06320		PC	SCHOLARSHIP	2,500.
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14851		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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
CORNELL UNIVERSITY 203 DAY HALL ITHACA, NY 14851		PC	SCHOLARSHIP	2,500.
CURRY COLLEGE 79C ATHERTON STREET MILTON, MA 02186		PC	SCHOLARSHIP	2,500.
CURRY COLLEGE 79C ATHERTON STREET MILTON, MA 02186		PC	SCHOLARSHIP	2,500.
DANIEL JAMES MCCARTHY MEMORIAL FUND 525 MASSACHUSETTS AVE., SUITE A ACTON, MA 01720		PC	CHILDREN, YOUTH & FAMILIES	16,140.
DANIEL JAMES MCCARTHY MEMORIAL FUND 525 MASSACHUSETTS AVE., SUITE A ACTON, MA 01720		PC	COMMUNITY	5,000.
DARTMOUTH COLLEGE 6016 MCNUTT HALL HANOVER, NH 03755		PC	SCHOLARSHIP	2,500.
DISCOVERING HIDDEN GEMS 446 MAIN STREET HUDSON, MA 01749		PC	CHILDREN, YOUTH & FAMILIES	10,000.
DISCOVERING HIDDEN GEMS 446 MAIN STREET HUDSON, MA 01749		PC	CHILDREN, YOUTH & FAMILIES	5,000.
DISCOVERING HIDDEN GEMS 446 MAIN STREET HUDSON, MA 01749		PC	COMMUNITY	3,500.
DISCOVERY MUSEUM 177 MAIN STREET ACTON, MA 01720		PC	CHILDREN, YOUTH & FAMILIES	11,500.
Total from continuation sheets				

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
DOC WAYNE YOUTH SERVICES, INC. 418 COMMONWEALTH AVENUE, ATTN: SANDY CADES BOSTON, MA 02215		PC	CHILDREN, YOUTH & FAMILIES	50,000.
ELIOT COMMUNITY HUMAN SERVICES, INC. 125 HARTWELL AVENUE LEXINGTON, MA 02421		PC	CHILDREN, YOUTH & FAMILIES	18,000.
ELON UNIVERSITY 2700 CAMPUS BOX ELON, NC 27244		PC	SCHOLARSHIP	2,500.
ELON UNIVERSITY 2700 CAMPUS BOX ELON, NC 27244		PC	SCHOLARSHIP	2,500.
EMERSON COLLEGE 216 TREMONT STREET, 4TH FLOOR BOSTON, MA 02116		PC	SCHOLARSHIP	2,500.
EMERSON COLLEGE 120 BOYLSTON STREET BOSTON, MA 02116		PC	SCHOLARSHIP	2,500.
EMERSON COLLEGE 216 TREMONT STREET, 4TH FLOOR BOSTON, MA 02116		PC	SCHOLARSHIP	2,500.
EMERSON COLLEGE 120 BOYLSTON STREET BOSTON, MA 02116		PC	SCHOLARSHIP	2,500.
FAIRFIELD UNIVERSITY 1073 N BENSON ROAD FAIRFIELD, CT 06824		PC	SCHOLARSHIP	2,500.
FAIRFIELD UNIVERSITY 1073 N BENSON ROAD FAIRFIELD, CT 06824		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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		PC	CHILDREN, YOUTH & FAMILIES	10,000.
FRAMINGHAM STATE UNIV. FOUNDATION 100 STATE STREET, PO BOX 9101 FRAMINGHAM, MA 01701		PC	COMMUNITY	5,000.
GAINING GROUND, INC. 341 VIRGINIA ROAD CONCORD, MA 01742		PC	COMMUNITY	3,720.
GARDENING THE COMMUNITY PO BOX 90774 SPRINGFIELD, MA 01139		PC	FARM & LOCAL FOOD	25,000.
GEORGETOWN UNIVERSITY G-19 HEALY HALL, BOX 571252, 3700 O ST, NW WASHINGTON, DC 20057		PC	SCHOLARSHIP	2,500.
GEORGETOWN UNIVERSITY G-19 HEALY HALL, BOX 571252, 3700 O ST, NW WASHINGTON, DC 20057		PC	SCHOLARSHIP	2,500.
GIFTS OF HOPE UNLIMITED PO BOX 338 SUDBURY, MA 01776		PC	SUDBURY	7,000.
GRATIS HEALTHCARE PO BOX 644 FRANKLIN, MA 02038		PC	COMMUNITY	5,000.
GREATER FRAMINGHAM COMMUNITY CHURCH 44 FRANKLIN STREET, BOX 629 FRAMINGHAM, MA 01702		PC	COMMUNITY	5,000.
GREATER FRAMINGHAM COMMUNITY CHURCH 44 FRANKLIN STREET, BOX 629 FRAMINGHAM, MA 01702		PC	COMMUNITY	5,000.
Total from continuation sheets				

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
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		PC	SCHOLARSHIP	2,500.
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		PC	SCHOLARSHIP	2,500.
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		PC	SCHOLARSHIP	2,500.
HAMILTON COLLEGE 198 COLLEGE HILL ROAD CLINTON, NY 13323		PC	SCHOLARSHIP	2,500.
HOOPS AND HOMEWORK 12B INTERFAITH TERRACE FRAMINGHAM, MA 01702		PC	CHILDREN, YOUTH & FAMILIES	16,000.
HOOPS AND HOMEWORK 12B INTERFAITH TERRACE FRAMINGHAM, MA 01702		PC	CHILDREN, YOUTH & FAMILIES	5,000.
HOPESUDBURY PO BOX 802 SUDBURY, MA 01776		PC	SUDBURY	15,000.
ITHACA COLLEGE 953 DANBY ROAD ITHACA, NY 14850		PC	SCHOLARSHIP	2,500.
ITHACA COLLEGE 953 DANBY ROAD ITHACA, NY 14850		PC	SCHOLARSHIP	2,500.
JEFF'S PLACE 281 PLEASANT STREET FRAMINGHAM, MA 01701		PC	CHILDREN, YOUTH & FAMILIES	25,000.
Total from continuation sheets				

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		PC	CHILDREN, YOUTH & FAMILIES	20,000.
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET, SUITE 101 FRAMINGHAM, MA 01702		PC	COMMUNITY	5,000.
KALANI HONUA 12-6860 KALAPANA KAPOHO ROAD, HI 96778		PC	SCHOLARSHIP	1,795.
LEADERSHIP METROWEST PO BOX 734 FRAMINGHAM, MA 01701		PC	COMMUNITY	1,595.
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		GOV	COMMUNITY	5,000.
LOVIN' SPOONFULS, INC. 1304 COMMONWEALTH AVENUE, SUITE E BOSTON, MA 02134		PC	FARM & LOCAL FOOD	33,000.
MASS FOOD SYSTEM COLLABORATIVE/TSNE MISSIONWORKS 89 SOUTH STREET 7TH FLOOR BOSTON, MA 02111		PC	FARM & LOCAL FOOD	25,000.
MASSACHUSETTS AUDUBON SOCIETY 208 SOUTH GREAT ROAD LINCOLN, MA 01773		PC	CHILDREN, YOUTH & FAMILIES	20,000.
MCGILL UNIVERSITY 3600 MCTAVISH STREET MONTREAL, QUEBEC, CANADA H3A 0G3		PC	SCHOLARSHIP	2,500.
MCGILL UNIVERSITY 3600 MCTAVISH STREET MONTREAL, QUEBEC, CANADA H3A 0G3		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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
MERRIMACK COLLEGE AUSTIN 15B, 315 TURNPIKE STREET NORTH ANDOVER, MA 01845		PC	SCHOLARSHIP	2,500.
MERRIMACK COLLEGE AUSTIN 15B, 315 TURNPIKE STREET NORTH ANDOVER, MA 01845		PC	SCHOLARSHIP	2,500.
METROWEST FOOD COLLABORATIVE 78 MAIN STREET HUDSON, MA 01749		PC	FARM & LOCAL FOOD	5,000.
METROWEST FREE MEDICAL PROGRAM 105 HUDSON ROAD SUDBURY, MA 01776		PC	SUDBURY	25,000.
METROWEST FREE MEDICAL PROGRAM 105 HUDSON ROAD SUDBURY, MA 01776		PC	COMMUNITY	5,000.
METROWEST MEDIATION SERVICES 220 NORTH MAIN STREET, SUITE 106 NATICK, MA 01760		PC	CHILDREN, YOUTH & FAMILIES	15,000.
METROWEST NONPROFIT NETWORK P.O. BOX 1661 FRAMINGHAM, MA 01701		PC	COMMUNITY	5,000.
METROWEST YMCA 280 OLD CONNECTICUT PATH FRAMINGHAM, MA 01701		PC	CHILDREN, YOUTH & FAMILIES	19,500.
MILL CITY GROWS 650 SUFFOLK STREET, SUITE G10 LOWELL, MA 01854		PC	FARM & LOCAL FOOD	25,000.
MORGAN STATE UNIVERSITY 1700 E. COLD SPRING LANE BALTIMORE, MD 21251		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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
MORGAN STATE UNIVERSITY 1700 E. COLD SPRING LANE BALTIMORE, MD 21251		PC	SCHOLARSHIP	2,500.
MOUNT HOLYOKE COLLEGE 16 SKINNER HALL, 50 COLLEGE STREET SOUTH HADLEY, MA 01075		PC	SCHOLARSHIP	2,500.
MOUNT HOLYOKE COLLEGE 16 SKINNER HALL, 50 COLLEGE STREET SOUTH HADLEY, MA 01075		PC	SCHOLARSHIP	2,500.
NEW ENTRY SUSTAINABLE FARMING PROJECT 733 CABOT STREET BEVERLY, MA 01915		PC	FARM & LOCAL FOOD	25,000.
ONE LOVE FOUNDATION 711 ATLANTIC AVENUE, 6TH FLOOR BOSTON, MA 02111		PC	CHILDREN, YOUTH & FAMILIES	7,000.
OUT METROWEST 160 HOLLIS STREET FRAMINGHAM, MA 01702		PC	CHILDREN, YOUTH & FAMILIES	80,000.
OUT METROWEST 160 HOLLIS STREET FRAMINGHAM, MA 01702		PC	CHILDREN, YOUTH & FAMILIES	20,000.
OUT METROWEST 160 HOLLIS STREET FRAMINGHAM, MA 01702		PC	COMMUNITY	5,000.
PHILANTHROPY MASSACHUSETTS 133 FEDERAL STREET, SUITE 802 BOSTON, MA 02110		PC	COMMUNITY	5,200.
PURDUE UNIVERSITY 475 STADIUM MALL DRIVE WEST LAFAYETTE, IN 47907		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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
PURDUE UNIVERSITY 475 STADIUM MALL DRIVE WEST LAFAYETTE, IN 47907		PC	SCHOLARSHIP	2,500.
PURDUE UNIVERSITY 475 STADIUM MALL DRIVE WEST LAFAYETTE, IN 47907		PC	SCHOLARSHIP	2,500.
PURDUE UNIVERSITY 475 STADIUM MALL DRIVE WEST LAFAYETTE, IN 47907		PC	SCHOLARSHIP	2,500.
REGIONAL ENVIRONMENTAL COUNCIL 9 CASTLE STREET, STE. 1 WORCESTER, MA 01610		PC	FARM & LOCAL FOOD	33,000.
REGIS COLLEGE 1000 STATE STREET SPRINGFIELD, MA 01109		PC	SCHOLARSHIP	2,500.
REGIS COLLEGE 1000 STATE STREET SPRINGFIELD, MA 01109		PC	SCHOLARSHIP	2,500.
RICE UNIVERSITY 6100 MAIN STREET HOUSTON, TX 77251		PC	SCHOLARSHIP	2,500.
RICE UNIVERSITY 6100 MAIN STREET HOUSTON, TX 77251		PC	SCHOLARSHIP	2,500.
ROGER WILLIAMS UNIVERSITY ONE OLD FERRY ROAD BRISTOL, RI 02809		PC	SCHOLARSHIP	2,500.
ROGER WILLIAMS UNIVERSITY ONE OLD FERRY ROAD BRISTOL, RI 02809		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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
SALVE REGINA UNIVERSITY 100 OCHRE POINT AVENUE NEWPORT, RI 02840		PC	SCHOLARSHIP	2,500.
SALVE REGINA UNIVERSITY 100 OCHRE POINT AVENUE NEWPORT, RI 02840		PC	SCHOLARSHIP	2,500.
SAVE A DOG, INC. 604 BOSTON POST ROAD SUDBURY, MA 01776		PC	SUDBURY	5,000.
SMILE MASS, INC. 66 DUDLEY ROAD SUDBURY, MA 01776		PC	SUDBURY	25,000.
SOAR MANAGEMENT CONSULTING GROUP 201 FREEMAN STREET, UNIT #9 BROOKLINE, MA 02446		PC	COMMUNITY	5,000.
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PC	CHILDREN, YOUTH & FAMILIES	25,000.
SPARK KINDNESS PO BOX 823 NATICK, MA 01760		PC	COMMUNITY	5,000.
SUDBURY COOPERATIVE PRESCHOOL 26 CONCORD ROAD SUDBURY, MA 01776		PC	SUDBURY	15,000.
SUDBURY EXTENDED DAY, INC. 327 CONCORD ROAD SUDBURY, MA 01776		PC	SUDBURY	25,000.
SUDBURY HISTORICAL SOCIETY 288 OLD SUDBURY ROAD SUDBURY, MA 01776		PC	SUDBURY	40,000.
Total from continuation sheets				

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
SUDBURY HISTORICAL SOCIETY 288 OLD SUDBURY ROAD SUDBURY, MA 01776		PC	SUDBURY	1,000.
SUDBURY VALLEY TRUSTEES 18 WOLBACH ROAD SUDBURY, MA 01776		PC	SUDBURY	15,000.
SUDBURY VALLEY TRUSTEES 18 WOLBACH ROAD SUDBURY, MA 01776		PC	COMMUNITY	5,000.
THE CARROT PROJECT 89 SOUTH STREET, 7TH FLOOR BOSTON, MA 02111		PC	FARM & LOCAL FOOD	33,000.
THE FOOD PROJECT, INC. 10 LEWIS STREET LINCOLN, MA 01773		PC	CHILDREN, YOUTH & FAMILIES	15,000.
THE GUILD FOR HUMAN SERVICES 521 VIRGINIA ROAD CONCORD, MA 01742		PC	CHILDREN, YOUTH & FAMILIES	25,000.
THINKGIVE, INC. PO BOX 92 CONCORD, MA 01742		PC	CHILDREN, YOUTH & FAMILIES	22,000.
THINKGIVE, INC. PO BOX 92 CONCORD, MA 01742		PC	COMMUNITY	5,000.
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		GOV	SUDBURY	30,000.
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		GOV	SUDBURY	21,000.
Total from continuation sheets				

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
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		GOV	SUDBURY	7,720.
TOWN OF SUDBURY - COUNCIL ON AGING 278 OLD SUDBURY ROAD SUDBURY, MA 01776		GOV	SUDBURY	1,715.
TOWN OF SUDBURY - COUNCIL ON AGING 278 OLD SUDBURY ROAD SUDBURY, MA 01776		GOV	SUDBURY	100.
TULANE UNIVERSITY 6823 ST. CHARLES AVENUE, BLDG. 14 NEW ORLEANS, LA 70118		PC	SCHOLARSHIP	2,500.
TULANE UNIVERSITY 205 SCIENCE AND ENGINEERING LAB COMPLEX NEW ORLEANS, LA 70118		PC	SCHOLARSHIP	2,500.
TULANE UNIVERSITY 6823 ST. CHARLES AVENUE, BLDG. 14 NEW ORLEANS, LA 70118		PC	SCHOLARSHIP	2,500.
TULANE UNIVERSITY 205 SCIENCE AND ENGINEERING LAB COMPLEX NEW ORLEANS, LA 70118		PC	SCHOLARSHIP	2,500.
UMASS DARTMOUTH 285 OLD WESTPORT ROAD DARTMOUTH, MA 02747		PC	SCHOLARSHIP	2,500.
UMASS DARTMOUTH 285 OLD WESTPORT ROAD DARTMOUTH, MA 02747		PC	SCHOLARSHIP	2,500.
UMASS DARTMOUTH 285 OLD WESTPORT ROAD DARTMOUTH, MA 02747		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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
UMASS DARTMOUTH 285 OLD WESTPORT ROAD DARTMOUTH, MA 02747		PC	SCHOLARSHIP	2,500.
UNION COLLEGE GRANT HALL, 807 UNION STREET SCHENECTADY, NY 12308		PC	SCHOLARSHIP	2,500.
UNION COLLEGE GRANT HALL, 807 UNION STREET SCHENECTADY, NY 12308		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK ROAD, UNIT 4116 STORRS, CT 06269		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK RD, UNIT 4116 STORRS, CT 06269-4116		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK ROAD, UNIT 4116 STORRS, CT 06269		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF CONNECTICUT 233 GLENBROOK RD, UNIT 4116 STORRS, CT 06269-4116		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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 MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 243 WHITMORE ADMIN BLDG., 181 PRESIDENTS DR AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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 MASSACHUSETTS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MASSACHUSETTS AMHERST 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF MICHIGAN 2500 STUDENT ACTIVITIES BLDG., 515 E. JEFFERSON ST ANN ARBOR, MA 48109-1316		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF NEW HAMPSHIRE 11 GARRISON AVENUE, STOKE HALL DURHAM, NH 03824		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF NEW HAMPSHIRE 11 GARRISON AVENUE, STOKE HALL DURHAM, NH 03824		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF PITTSBURGH 139 UNIVERSITY PLACE, THACKERAY HALL PITTSBURGH, PA 15260		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF PITTSBURGH 139 UNIVERSITY PLACE, THACKERAY HALL PITTSBURGH, PA 15260		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF RICHMOND QUEALLY CENTER, SUITE 214, 142 UR DRIVE RICHMOND, VA 23173		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF RICHMOND QUEALLY CENTER, SUITE 214, 142 UR DRIVE RICHMOND, VA 23173		PC	SCHOLARSHIP	2,500.
Total from continuation sheets				

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 RICHMOND QUEALLY CENTER, SUITE 214, 142 UR DRIVE RICHMOND, VA 23173		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF VERMONT 223 WATERMAN BUILDING BURLINGTON, VT 05405		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF VERMONT 223 WATERMAN BLDG., 85 S PROSPECT STREET BURLINGTON, VT 05405		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF VERMONT 223 WATERMAN BUILDING BURLINGTON, VT 05405		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF VERMONT 223 WATERMAN BLDG., 85 S PROSPECT STREET BURLINGTON, VT 05405		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF VIRGINIA 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
UNIVERSITY OF VIRGINIA 37 MATHER DRIVE AMHERST, MA 01003		PC	SCHOLARSHIP	2,500.
WAYSIDE INN 72 WAYSIDE INN ROAD SUDBURY, MA 01776		PC	SUDBURY	25,000.
WAYSIDE INN 72 WAYSIDE INN ROAD SUDBURY, MA 01776		PC	SUDBURY	23,000.
WAYSIDE YOUTH & FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM, MA 01701		PC	CHILDREN, YOUTH & FAMILIES	20,000.
Total from continuation sheets				

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		PC	COMMUNITY	5,000.
WELLESLEY COLLEGE 106 CENTRAL STREET WELLESLEY, MA 02481		PC	SCHOLARSHIP	2,500.
WELLESLEY COLLEGE 106 CENTRAL STREET WELLESLEY, MA 02481		PC	SCHOLARSHIP	2,500.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		PC	SCHOLARSHIP	2,500.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		PC	SCHOLARSHIP	2,500.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		PC	SCHOLARSHIP	2,500.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		PC	SCHOLARSHIP	2,500.
WENTWORTH INSTITUTE OF TECHNOLOGY 550 HUNTINGTON AVENUE BOSTON, MA 02115		PC	SCHOLARSHIP	2,000.
WILDFLOWER, INC. 271 LINCOLN STREET, SUITE 12 LEXINGTON, MA 02421		PC	CHILDREN, YOUTH & FAMILIES	10,000.
WILDFLOWER, INC. 271 LINCOLN STREET, SUITE 12 LEXINGTON, MA 02421		PC	COMMUNITY	5,000.
Total from continuation sheets				

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 5

(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.
6,855,492.	6,792,166.	0.	0.
(F) GAIN OR LOSS	63,326.		
CAPITAL GAINS DIVIDENDS FROM PART IV			
			0.
TOTAL TO FORM 990-PF, PART I, LINE 6A			63,326.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 6

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENT	574,572.	0.	574,572.	563,795.	575,322.
TO PART I, LINE 4	574,572.	0.	574,572.	563,795.	575,322.

FORM 990-PF OTHER INCOME STATEMENT 7

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INVESTMENT INCOME	838.	0.	
INTEREST FROM PROGRAM RELATED INVESTMENTS	750.	750.	
RENTAL FEES	850.	0.	
RETURNED GRANT FUNDS	4,843.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	7,281.	750.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	20,405.	2,041.	0.	18,364.	
TO FORM 990-PF, PG 1, LN 16B	20,405.	2,041.	0.	18,364.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OTHER PROFESSIONAL CONSULTANTS	14,800.	0.	0.	14,800.	
TO FORM 990-PF, PG 1, LN 16C	14,800.	0.	0.	14,800.	

FORM 990-PF	TAXES			STATEMENT	10
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PAYROLL TAXES	16,127.	0.	0.	16,127.	
FEDERAL EXCISE TAX EXPENSE	9,982.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	26,109.	0.	0.	16,127.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	11
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE EXPENSES	35,103.	0.	0.	35,103.	
TO FORM 990-PF, PG 1, LN 23	35,103.	0.	0.	35,103.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	12
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE BONDS	8,178,315.	8,178,315.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	8,178,315.	8,178,315.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	13
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	20,569,910.	20,569,910.
PRIVATE EQUITY FUNDS	COST	1,944,448.	1,944,448.
COMMODITIES	COST	687,753.	687,753.
TOTAL TO FORM 990-PF, PART II, LINE 13		23,202,111.	23,202,111.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	14
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER	2,684.	2,684.	0.
BUILDING	1,182,714.	458,299.	724,415.
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.	2,242.	561.
COMPUTER	2,168.	2,168.	0.
COMPUTER	2,368.	2,368.	0.
COMPUTER	2,099.	2,099.	0.
LANDSCAPING	3,915.	1,958.	1,957.
LYNCH LANDSCAPING - FRONT			
LANDING	14,607.	1,461.	13,146.
TWO MACBOOK AIRS	3,698.	740.	2,958.
TOTAL TO FM 990-PF, PART II, LN 14	1,309,308.	516,386.	792,922.

FORM 990-PF	OTHER ASSETS		STATEMENT 15
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PROGRAM RELATED INVESTMENT	100,000.	200,000.	200,000.
TO FORM 990-PF, PART II, LINE 15	100,000.	200,000.	200,000.

FORM 990-PF	OTHER LIABILITIES		STATEMENT 16
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
DEFERRED EXCISE TAX LIABILITY	106,910.	12,918.	
TOTAL TO FORM 990-PF, PART II, LINE 22	106,910.	12,918.	

FORM 990-PF PART VII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS STATEMENT 17

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	143,974.	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.
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.

SONIA SHAH
326 CONCORD ROAD
SUDBURY, MA 01776

EXECUTIVE DIRECTOR

40.00 132,188. 9,703. 0.

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

276,162. 9,703. 0.

COPY

FORM 990-PF

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

STATEMENT 18

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
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 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, 2023**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ calendar year **2022** 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-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	49,623.
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	\$	49,623.
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-TE and Form 8879-TE for payment instructions.