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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning 01-01-2010 , and ending 12-31-2010

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

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) | Room/suite
326 CONCORD RD

B Telephone number (see page 10 of the instructions)
(978) 443-0849

City or town, state, and ZIP code
SUDBURY, MA 01776

C If exemption application is pending, check here ▶ ☐
D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 30,149,261

J Accounting method ☐ Cash ☑ Accrual
☐ Other (specify) _
(Part I, column (d) must be on cash basis.)

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

			(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 (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	721,067	746,423		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	611,006			
	b	Gross sales price for all assets on line 6a 5,942,068				
	7	Capital gain net income (from Part IV, line 2)		590,755		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	6,994	5,674	0	
	12	**Total.** Add lines 1 through 11	1,339,067	1,342,852	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	136,882	15,382	0	121,500
	14	Other employee salaries and wages	24,240	0	0	24,240
	15	Pension plans, employee benefits	8,787	0	0	8,787
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	17,763	1,776	0	15,987
	c	Other professional fees (attach schedule)	9,007	1,150	0	7,857
	17	Interest		13,794		
	18	Taxes (attach schedule) (see page 14 of the instructions)	31,632	48	0	10,632
	19	Depreciation (attach schedule) and depletion	23,411	0	0	
	20	Occupancy	27,781	0	0	27,781
	21	Travel, conferences, and meetings	6,530	0	0	6,530
	22	Printing and publications				
	23	Other expenses (attach schedule)	16,431	31,431	0	16,367
	24	**Total operating and administrative expenses.** Add lines 13 through 23	302,464	63,581	0	239,681
	25	Contributions, gifts, grants paid	684,445			867,445
	26	**Total expenses and disbursements.** Add lines 24 and 25	986,909	63,581	0	1,107,126
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	352,158			
	b	**Net investment income** (if negative, enter -0-)		1,279,271		
	c	**Adjusted net income** (if negative, enter -0-)			0	

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	10,028	9,554	9,554
	2	Savings and temporary cash investments	497,078	336,455	336,455
	3	Accounts receivable ▶ 25,840			
		Less allowance for doubtful accounts ▶	8,857	25,840	25,840
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ 66,868			
		Less allowance for doubtful accounts ▶ 18,586	57,720	48,282	48,282
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges		14,000	14,000
	10a	Investments—U S and state government obligations (attach schedule)	9,595		
	b	Investments—corporate stock (attach schedule)	2,709,293	2,881,368	2,881,368
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	23,123,824	25,643,474	25,643,474
	14	Land, buildings, and equipment basis ▶ 1,303,229			
		Less accumulated depreciation (attach schedule) ▶ 112,941	1,213,699	1,190,288	1,190,288
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	27,630,094	30,149,261	30,149,261
Liabilities	17	Accounts payable and accrued expenses	4,000	4,179	
	18	Grants payable	336,000	148,000	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)	10,000	15,000	
	23	**Total liabilities** (add lines 17 through 22)	350,000	167,179	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☑ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	27,280,094	29,982,082	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	27,280,094	29,982,082	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	27,630,094	30,149,261	

Part III **Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	27,280,094
2	Enter amount from Part I, line 27a	2	352,158
3	Other increases not included in line 2 (itemize) ▶	3	2,349,830
4	Add lines 1, 2, and 3	4	29,982,082
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	29,982,082

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , 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)
1 a	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	5,942,068		5,351,313	590,755
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) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				590,755
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	590,755
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 pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	1,179,769	23,950,337	0 049259
2008	1,711,562	28,463,004	0 060133
2007	1,668,677	32,014,554	0 052122
2006	1,878,000	30,107,694	0 062376
2005	1,252,078	28,443,002	0 044021

2	**Total** of line 1, column (d)	2	0 267911
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 053582
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	26,687,801
5	Multiply line 4 by line 3	5	1,429,986
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	12,793
7	Add lines 5 and 6	7	1,442,779
8	Enter qualifying distributions from Part XII, line 4	8	1,107,126

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ______ (attach copy of letter if necessary–see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b		1	25,585
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3	Add lines 1 and 2		3	25,585
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	25,585
6	Credits/Payments			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a 37,798		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	37,798
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached		8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	12,213
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 12,213	**Refunded** ▶	11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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?	6		No
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the 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 General Instruction G? *If "No," attach explanation*	8b	Yes	
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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶WWW SUDBURYFOUNDATION ORG

14 The books are in care of ▶BANK OF AMERICA PHIL MGMT GROUP Telephone no ▶(617) 434-5669

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 ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

16	At any time during calendar year 2010, 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?	16		No

See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶

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

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

			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? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☑ Yes ☐ No			
	(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)? ☐ Yes ☑ No			
	(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). ☐ Yes ☑ No			
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 page 20 of the instructions)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		No
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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
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 page 20 of the instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
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			
b	If "Yes," did it have excess business holdings in 2010 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2010?	4b		No

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

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))? ☐ Yes ☑ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☑ 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? ☐ Yes ☑ 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 page 22 of the instructions)? **5b**

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ 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? ☐ Yes ☑ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No

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? ☐ Yes ☑ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(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 Additional Data Table				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). 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
NONE				

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 (see page 23 of the instructions). 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 GRANTS - SUPPORTS ELIGIBLE NOT-FOR-PROFIT ORGANIZATIONS WHOSE WORK MEETS THE OBJECTIVES OF THE FOUNDATION'S SUDBURY, REGIONAL & ENVIRONMENTAL GRANT PROGRAMS	459,277
2 SCHOLARSHIPS - TO LOCAL, ELIGIBLE HIGH SCHOOL SENIORS WHO ARE EITHER GRADUATING FROM LINCOLN-SUDBURY REGIONAL HIGH SCHOOL (LSRHS), SUDBURY RESIDENTS GRADUATING FROM ANOTHER HIGH SCHOOL OR WHO ARE THE DEPENDENTS OF TOWN OF SUDBURY OR LSRHS EMPLOYEES STUDENT MAY REAPPLY FOR A TOTAL OF FOUR YEARS OF SUPPORT	372,013
3 COMMUNITY - PROVIDES STAFF GUIDANCE AND OTHER RESOURCES (E G ROOM RENTAL) TO LOCAL NONPROFITS AND COMMUNITY GROUPS TO SUPPORT THEM IN FULFILLING THEIR MISSION	35,736
4 LOAN ADMINISTRATION - THE FORMER COLLEGE LOAN PROGRAM, KNOWN AS THE STUDENT AID PROGRAM, WAS PHASED OUT IN THE MID 1990'S	2,727

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3. . . . . ▶	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	26,777,021
b	Average of monthly cash balances	1b	299,844
c	Fair market value of all other assets (see page 24 of the instructions)	1c	17,349
d	**Total** (add lines 1a, b, and c)	1d	27,094,214
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	27,094,214
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	406,413
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	26,687,801
6	**Minimum investment return.** Enter 5% of line 5	6	1,334,390

Part XI Distributable Amount (see page 25 of the 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	1,334,390
2a	Tax on investment income for 2010 from Part VI, line 5 — 2a: 25,585		
b	Income tax for 2010 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	25,585
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,308,805
4	Recoveries of amounts treated as qualifying distributions	4	9,374
5	Add lines 3 and 4	5	1,318,179
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	1,318,179

Part XII Qualifying Distributions (see page 25 of the 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	1,107,126
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	1,107,126
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 (see page 26 of the instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,107,126

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 page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7					1,318,179
2 Undistributed income, if any, as of the end of 2010					
a Enter amount for 2009 only.				0	
b Total for prior years 20___ , 20___ , 20___			0		
3 Excess distributions carryover, if any, to 2010					
a From 2005.					
b From 2006.	141,054				
c From 2007.	94,211				
d From 2008.	284,525				
e From 2009.					
f **Total** of lines 3a through e.		519,790			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 1,107,126					
a Applied to 2009, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .		0			
d Applied to 2010 distributable amount.					1,107,126
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		211,053			211,053
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		308,737			
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 page 27 of the instructions . . .			0		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				0	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)		0			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)		0			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a		308,737			
10 Analysis of line 9					
a Excess from 2006. . . .					
b Excess from 2007. . . .	24,212				
c Excess from 2008. . . .	284,525				
d Excess from 2009. . . .					
e Excess from 2010. . . .					

Part XIV **Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling. . . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2010	**(b)** 2009	**(c)** 2008	**(d)** 2007	
2a 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 organization had $5,000 or more in assets at any time during the year—see page 27 of the 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))

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

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 (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

MARILYN MARTINO
326 CONCORD ROAD
SUDBURY, MA 01776
(978) 443-0849

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

WRITTEN PROPOSAL TO FOUNDATION SEE WEBSITE FOR DETAILS WWW SUDBURYFOUNDATION ORG

c Any submission deadlines

ATKINSON SCHOLARSHIPS - FEBRUARY 1 SUBMISSION SCHEDULES AVAILABLE FOR ALL OTHERS UPON REQUEST

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

SUDBURY OR METROWEST RESIDENTS ENVIRONMENTAL ORGANIZATIONS

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				867,445
b *Approved for future payment* See Additional Data Table				
Total . . . . ▶ **3b**				163,000

Part XVI-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 (See page 28 of the instructions)
1 Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
a STUDENT LOAN INTEREST					2,683
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	721,067	
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.			14	2,596	
8 Gain or (loss) from sales of assets other than inventory			18	611,006	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a OTHER INCOME					1,715
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		0		1,334,669	4,398

13 Total. Add line 12, columns (b), (d), and (e). **13** 1,339,067

(See worksheet in line 13 instructions on page 28 to verify calculations)

Part XVI-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 XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
1A	INTEREST ON STUDENT LOANS CONSISTENT WITH CHARITABLE PURPOSE
11A	GRANGE RENTAL FEES FOR COMMUNITY GROUPS

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (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.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

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

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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 or fiduciary) is based on all information of which preparer has any knowledge

******	2011-05-10	******
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only

Preparer's Signature ▶ JOEL ARONSON	Date 2011-05-10	Check if self-employed ▶ ☐	PTIN
Firm's name ▶ ALEXANDER ARONSON FINNING & CO PC		Firm's EIN ▶	
Firm's address ▶ 21 EAST MAIN STREET WESTBORO, MA 01581		Phone no (508) 366-9100	

TY 2010 Accounting Fees Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING AND AUDIT FEES	17,763	1,776	0	15,987

TY 2010 Investments Corporate Stock Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	2,881,368	2,881,368

TY 2010 Investments - Other Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	AT COST	24,590,775	24,590,775
PEP,LLC	AT COST	1,052,699	1,052,699

TY 2010 Other Expenses Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSES	16,367	0	0	16,367
OTHER EXPENSES RELATING TO PEP INVESTMENTS K-1	0	31,431	0	0
BAD DEBTS, NET OF RECOVERIES	64	0	0	0

TY 2010 Other Income Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER		395	
OTHER	2,596	2,596	
STUDENT LOAN INTEREST	2,683	2,683	0
OTHER INCOME	1,715		1,715

TY 2010 Other Increases Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	2,349,830

TY 2010 Other Liabilities Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Description	Beginning of Year - Book Value	End of Year - Book Value
SCHOLARSHIP PAYABLE	10,000	15,000

TY 2010 Other Professional Fees Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STUDENT LOAN ADMIN FEES	1,150	1,150	0	0
OTHER PROFESSIONAL CONSULTANTS	7,857	0	0	7,857

TY 2010 Taxes Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	21,000	0	0	0
PAYROLL TAXES	9,772	0	0	9,772
STATE FILING FEE	860	0	0	860
FOREIGN TAXES	0	48	0	0

Additional Data

Software ID:
Software Version:
EIN: 04-6037026
Name: THE SUDBURY FOUNDATION

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, 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
BANK OF AMERICA MERRILL LYNCH PO BOX 55850 MA1-225-04-02 BOSTON, MA 02205	TRUSTEE 40 00	15,382	0	0
RICHARD H DAVISON 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 8 00	3,600	0	0
SUSAN IULIANO 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE/CHAIRMAN 4 00	7,200	0	0
JILL STANSKY 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4 00	3,600	0	0
MARILYN MARTINO 326 CONCORD ROAD SUDBURY, MA 01776	EXECUTIVE DIRECTOR 40 00	103,500	7,763	0
MINER CRARY 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4 00	3,600	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
A PLACE TO TURN 99 HARTFORD STREET NATICK, MA 01760		PUBLIC CHARITY	REGIONAL	5,200
A SUITABLE IMAGE PO BOX 4806 FRAMINGHAM, MA 017044806		PUBLIC CHARITY	REGIONAL	5,000
ADAM RAPHAEL 526 COMMONWEALTH AVENUE NEWTON CENTER, MA 02459		INDIVIDUAL	SCHOLARSHIP	5,000
AILEEN KLINE 22 PARMENTER ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ALEC ELLSWORTH 37 OLD BILLERICA ROAD BEDFORD, MA 01730		INDIVIDUAL	SCHOLARSHIP	2,500
ALEC ELLSWORTH 37 OLD BILLERICA ROAD BEDFORD, MA 01730		INDIVIDUAL	SCHOLARSHIP	2,500
ALEC ELLSWORTH 37 OLD BILLERICA ROAD BEDFORD, MA 01730		INDIVIDUAL	SCHOLARSHIP	2,500
AMAZING THINGS ARTS CENTER 160 HOLLIS STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	REGIONAL	15,000
AMER GALUAK 270 CONCORD ROAD LINCOLN, MA 01773		INDIVIDUAL	SCHOLARSHIP	2,500
ANDREW CORWIN 17 HICKORY LANE FRAMINGHAM, MA 01701		INDIVIDUAL	SCHOLARSHIP	2,500
ANDREW CORWIN 17 HICKORY LANE FRAMINGHAM, MA 01701		INDIVIDUAL	SCHOLARSHIP	5,000
ANNA BRUNNER 261 GOODMANS HILL ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
APERHAMA PARANGI 44 CONANT ROAD LINCOLN, MA 01773		INDIVIDUAL	SCHOLARSHIP	5,000
ASSABET VALLEY COLLABORATIVE 57 ORCHARD STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	REGIONAL	33,000
ASSOCIATED GRANT MAKERS INC 55 COURT STREET SUITE 520 BOSTON, MA 02108		PUBLIC CHARITY	SUDBURY	5,250
Total . . . . ▶ **3a**				867,445

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
BOYS AND GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBORO, MA 01752		PUBLIC CHARITY	REGIONAL	2,600
CECILIA IGWE-KALU 40 OAKCREST ROAD BOSTON, MA 02136		INDIVIDUAL	SCHOLARSHIP	5,000
CENTER FOR PARENTS AND TEACHERS 120 MERIAM ROAD CONCORD, MA 01742		PUBLIC CHARITY	REGIONAL	10,000
CHRISTINE DUGGAN 96 WARREN ROAD PO BOX 628 SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
COBSCOOK BAY RESOURCE CENTER 4 FAVOR STREET EASTPORT, ME 04631		PUBLIC CHARITY	ENVIRONMENT	20,000
COBSCOOK BAY RESOURCE CENTER 4 FAVOR STREET EASTPORT, ME 04631		PUBLIC CHARITY	ENVIRONMENT	10,000
CONCORD-CARLISLE COMMUNITY CHEST 111 OLD ROAD TO NINE ACRE CORNER CONCORD, MA 01742		PUBLIC CHARITY	REGIONAL	5,000
DANFORTH MUSEUM OF ART 123 UNION AVENUE FRAMINGHAM, MA 01702		PUBLIC CHARITY	REGIONAL	10,000
DANIEL HART 68 UPLAND ROAD MARLBOROUGH, MA 01752		INDIVIDUAL	SCHOLARSHIP	2,500
DANIELLE MCAVOY 11 DOUGLAS DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
DECORDOVA SCULPTURE PARK & MUSEUM 51 SANDY POND ROAD LINCOLN, MA 01773		PUBLIC CHARITY	REGIONAL	10,000
DISCOVERY MUSEUMS 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	REGIONAL	15,000
DOUGLAS BRADFORD 25 MAPLE AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,500
EDWARD LEE CAL TECH MSC602 PASADENA, CA 91126		INDIVIDUAL	SCHOLARSHIP	5,000
EMPLOYMENT OPTIONS 82 BRIGHAM STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	REGIONAL	15,000
Total . . . . ▶ 3a				867,445

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
ERIKA RYAN 284 BISHOPS FOREST DRIVE WALTHAM, MA 02452		INDIVIDUAL	SCHOLARSHIP	5,000
FIONNUALA SEIFERTH 93 WELLS ROAD LINCOLN, MA 01773		INDIVIDUAL	SCHOLARSHIP	5,000
FRAMINGHAM COURT MEDIATION SERVICES INC 600 CONCORD STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	REGIONAL	5,000
FRAMINGHAM HISTORY CENTER PO BOX 2032 FRAMINGHAM, MA 01703		PUBLIC CHARITY	REGIONAL	12,000
FRAMINGHAM HISTORY CENTER PO BOX 2032 FRAMINGHAM, MA 01703		PUBLIC CHARITY	REGIONAL	3,500
FRAMINGHAM POLICE DEPARTMENT 1 WILLIAM WELCH WAY FRAMINGHAM, MA 01702		MUNICIPALITY	REGIONAL	5,000
FRAMINGHAM PUBLIC SCHOOLS 31 FLAGG DRIVE FRAMINGHAM, MA 01702		MUNICIPALITY	REGIONAL	12,000
GAINING GROUND INC PO BOX 374 CONCORD, MA 01741		PUBLIC CHARITY	REGIONAL	5,000
GRAHAM BOYD 26 MUSKET LANE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
HANNAH MODE 20 WILLOW ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
HUDSON AREA ARTS ALLIANCE 155 APSLEY STREET HUDSON, MA 01749		PUBLIC CHARITY	REGIONAL	5,000
JAMES IVKER 9 SPRINGHILL ROAD WAYLAND, MA 01778		INDIVIDUAL	SCHOLARSHIP	5,000
JONATHAN WEINSTEIN 42 VILLAGE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
JULIA SINGER KATZ 195 BINNEY STREET 2310 CAMBRIDGE, MA 02142		INDIVIDUAL	SCHOLARSHIP	5,000
KATHERINE MILLER 453 SUDBURY STREET MARLBOROUGH, MA 01752		INDIVIDUAL	SCHOLARSHIP	5,000
Total . . . . ▶ **3a**				867,445

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
KELLY SHERRER 17 WINTER STREET SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KELSEY BERKOWITZ 61 OAKWOOD AVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KETURAH EDWARDS 23A CIRCUIT STREET ROXBURY, MA 02119		INDIVIDUAL	SCHOLARSHIP	5,000
KIDS CONNECT INC 43 MAIN STREET NATICK, MA 01760		PUBLIC CHARITY	REGIONAL	5,000
KLO STINE 53 STONE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KOURTNEY LEWIS-ALLEN 128 RIVER STREET MATTAPAN, MA 02126		INDIVIDUAL	SCHOLARSHIP	5,000
KYLE BERKOWITZ 61 OAKWOOD AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
LARINA KLEYNERMAN 15 PINEWOOD AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
LAURA HOLZWASSER 48 WARREN ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
LAUREN RECHEL C/O LEWIS FANWICK 994 NORTH COLONY ROAD UNIT 192 WALLINGFORD, CT 06492		INDIVIDUAL	SCHOLARSHIP	5,000
LEE SYATT PO BOX 185 SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,500
LEE SYATT PO BOX 185 SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,500
LIANA SARAPAS 52 GREENWOOD AVE WAKEFIELD, MA 01880		INDIVIDUAL	SCHOLARSHIP	5,000
LINDSAY HUTCHINSON 7 GRANT ROAD WESTBOROUGH, MA 01581		INDIVIDUAL	SCHOLARSHIP	5,000
LONGFELLOW'S WAYSIDE INN 72 WAYSIDE INN ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	25,000
Total . . . . ▶ **3a**				867,445

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
LUKE BIGGINS 149 MAYNARD FARM ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,500
MANITOU CAMPS FOUNDATION PO BOX 5072 WAYLAND, MA 01778		PUBLIC CHARITY	REGIONAL	13,200
MARIAM KAHN-WOODS 94 PURITAN LANE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MASSACHUSETTS AUDUBON SOCIETY 208 SOUTH GREAT ROAD LINCOLN, MA 01773		PUBLIC CHARITY	REGIONAL	15,000
MATTHEW JOHNSON 11 OCTOBER ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MATTHEW THOMPSON 20 CHECKERBERRY CIRCLE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MEGAN BRAUN 148 NORTH ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
METROWEST FREE MEDICAL PROGRAM 105 HUDSON ROAD SUDBURY, MA 01776		PUBLIC CHARITY	REGIONAL	5,000
METROWEST NONPROFIT NETWORK PO BOX 1661 FRAMINGHAM, MA 01701		PUBLIC CHARITY	REGIONAL	3,000
MICHELE MARKOWITZ 7 LAKE SHORE DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,500
MICHELLE ACKERMAN 22 COLBURN CIRCLE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MOHAMMED HUSSAIN 789 BOSTON POST ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
NE GRASSROOTS ENVIRONMENT FUND PO BOX 1057 MONTPELIER, VT 05601		PUBLIC CHARITY	ENVIRONMENT	40,000
NIA FERGUSON 12 GASTON STREET BOSTON, MA 02121		INDIVIDUAL	SCHOLARSHIP	5,000
NORTHERN FOREST CANOE TRAIL PO BOX 565 WAITSFIELD, VT 05673		PUBLIC CHARITY	ENVIRONMENT	25,000
Total . . . . ▶ **3a**				867,445

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
NORTHERN FOREST CENTER PO BOX 210 CONCORD, NH 03302		PUBLIC CHARITY	ENVIRONMENT	40,000
OLIVIA GUTOWSKI 13 BIRCHWOOD AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ORGANIZATION FOR THE ASSABET RIVER 23 BRADFORD STREET PO BOX 1116 CONCORD, MA 01742		PUBLIC CHARITY	REGIONAL	20,000
PARMENTER VNA AND COMMUNITY CARE INC 266 COCHITUATE ROAD WAYLAND, MA 01778		PUBLIC CHARITY	REGIONAL	15,000
PAULINA RODIS 32 SHADOW OAK DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
PENOBSCOT EAST RESOURCE CENTER PO BOX 27 43 SCHOOL STREET 1D STONINGTON, ME 04681		PUBLIC CHARITY	ENVIRONMENT	35,000
PERFORMING ARTS CENTER OF METROWEST 140 PEARL STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	REGIONAL	9,700
PETER LYNCH 7 LAKEWOOD DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
QJAQUICE BRANTLEY 13 TORREY STREET BOSTON, MA 02124		INDIVIDUAL	SCHOLARSHIP	5,000
QUEBEC-LABRADOR FOUNDATION 55 SOUTH MAIN STREET IPSWICH, MA 01938		PUBLIC CHARITY	ENVIRONMENT	20,000
RADELYS GERMAN 7 SKYLINE ROAD HYDE PARK, MA 02136		INDIVIDUAL	SCHOLARSHIP	5,000
REGAN STUBBS 28 BENT BROOK ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
RUSULENNI CASTRO 97 AMORY STREET ROXBURY, MA 02119		INDIVIDUAL	SCHOLARSHIP	5,000
RYAN JOYNER 19 CENTER STREET SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
SAVANNAH TENNEY 61 ROBBINS ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
Total . . . . ▶ **3a**				867,445

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
SEDA BABROUDI 154 LEXINGTON ROAD LINCOLN, MA 01773		INDIVIDUAL	SCHOLARSHIP	5,000
SEONGKYUL PARK MACALASTER COLLEGE 1600 GRAND AVENUE PO BOX 1617 SAINT PAUL, MN 55105		INDIVIDUAL	SCHOLARSHIP	5,000
SEONGKYUL PARK MACALASTER COLLEGE 1600 GRAND AVENUE PO BOX 1617 SAINT PAUL, MN 55105		INDIVIDUAL	SCHOLARSHIP	2,200
SHANNON WARD 5 CRESCENT LANE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
SHANNON WARD 5 CRESCENT LANE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,300
SOPHIA LUFKIN 127 TRAPELO ROAD LINCOLN, MA 01773		INDIVIDUAL	SCHOLARSHIP	5,000
SOPHIA LUFKIN 127 TRAPELO ROAD LINCOLN, MA 01773		INDIVIDUAL	SCHOLARSHIP	1,295
STEPHANIE LEE 810 CONCORD ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
SUDBURY PUBLIC SCHOOLS 40 FAIRBANK ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	1,500
SUDBURY VALLEY TRUSTEES INC 18 WOLBACH ROAD SUDBURY, MA 01776		PUBLIC CHARITY	REGIONAL	19,200
TAVIANNA WILLIAMS 735 SHAWMUT AVENUE 413 ROXBURY, MA 02119		INDIVIDUAL	SCHOLARSHIP	5,000
TAYLOR CHAREST 50 NORMANDY DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
TESS ZINNES 45 GREENWOOD ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
THE CONCORD PLAYERS PO BOX 22 CONCORD, MA 01742		PUBLIC CHARITY	REGIONAL	5,000
TOWN OF SUDBURYCOUNCIL ON AGING 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	15,000
Total . . . . ▶ 3a				867,445

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
TOWN OF SUDBURYDEPT OF PUBLIC WORKS 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	37,000
TOWN OF SUDBURYPARK AND RECREATION DEPARTMENT 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	2,000
VICTORIA LEE 810 CONCORD ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
WILLIAM O'BRIEN PO BOX 711 SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
WILLIAM SAWYER 56 PRATTS MILL ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
Total . . . . ▶ **3a**				867,445

Form 990PF Part XV Line 3b - Grants and Contributions Approved for Future Payment

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
b *Approved for future payment*				
ASSABET VALLEY COLLABORATIVE 57 ORCHARD STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	REGIONAL	33,000
CONCORD-CARLISLE COMMUNITY CHEST111 OLD ROAD TO NINE ACRE CORNER CONCORD, MA 01742		PUBLIC CHARITY	REGIONAL	5,000
DANIEL HART68 UPLAND ROAD MARLBOROUGH, MA 01752		INDIVIDUAL	SCHOLARSHIP	5,000
LONGFELLOW'S WAYSIDE INN72 WAYSIDE INN ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	25,000
MAURA MCGRATH42 BLUEBERRY HILL LANE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
NE GRASSROOTS ENVIRONMENT FUNDPO BOX 1057 MONTPELIER, VT 05601		PUBLIC CHARITY	ENVIRONMENT	40,000
PENOBSCOT EAST RESOURCE CENTERPO BOX 27 43 SCHOOL STREET 1D STONINGTON, ME 04681		PUBLIC CHARITY	ENVIRONMENT	35,000
PETER LYNCH7 LAKEWOOD DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,500
SHANNON WARD5 CRESCENT LANE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	2,500
SUDBURY HISTORICAL SOCIETY 322 CONCORD ROAD 2ND FLOOR TOWN HALL SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	10,000
Total . . . . ▶ **3b**				163,000