Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

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 (see instructions)
(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 ▶ ☐

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

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 ▶ ☐

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)*▶$ 33,039,048

J Accounting method ☐ Cash ☑ Accrual
☐ 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 ▶ ☐

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 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	591,415	616,098		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	1,874,930			
	b	Gross sales price for all assets on line 6a 16,014,370				
	7	Capital gain net income (from Part IV, line 2)		1,933,667		
	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)	4,012	1,652	0	
	12	**Total.** Add lines 1 through 11	2,470,357	2,551,417	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	237,542	103,849	0	133,693
	14	Other employee salaries and wages	37,000	0	0	37,000
	15	Pension plans, employee benefits	9,348	0	0	9,348
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	19,562	1,956	0	17,606
	c	Other professional fees (attach schedule)	5,987	0	0	5,987
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	44,308	526	0	11,604
	19	Depreciation (attach schedule) and depletion	21,710	0	0	
	20	Occupancy	25,140	0	0	25,140
	21	Travel, conferences, and meetings	1,616	0	0	1,617
	22	Printing and publications				
	23	Other expenses (attach schedule)	22,840	12,610	0	22,840
	24	**Total operating and administrative expenses.** Add lines 13 through 23	425,053	118,941	0	264,835
	25	Contributions, gifts, grants paid	1,281,635			1,101,635
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,706,688	118,941	0	1,366,470
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	763,669			
	b	**Net investment income** (if negative, enter -0-)		2,432,476		
	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	13,566	9,768	9,768
2	Savings and temporary cash investments	1,309,669	1,108,998	1,108,998
3	Accounts receivable ▶ 8,359			
	Less allowance for doubtful accounts ▶	29,891	8,359	8,359
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 instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges	52,397	23,747	23,747
10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)			
c	Investments—corporate bonds (attach schedule)	4,465,151	6,742,915	6,742,915
11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	25,914,165	24,039,152	24,039,152
14	Land, buildings, and equipment basis ▶ 1,277,650			
	Less accumulated depreciation (attach schedule) ▶ 171,541	1,127,819	1,106,109	1,106,109
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	32,912,658	33,039,048	33,039,048
Liabilities				
17	Accounts payable and accrued expenses	6,400	2,396	
18	Grants payable	95,000	275,000	
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 ▶)	81,996	66,050	
23	**Total liabilities** (add lines 17 through 22)	183,396	343,446	
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	32,729,262	32,695,602	
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 instructions)	32,729,262	32,695,602	
31	**Total liabilities and net assets/fund balances** (see instructions)	32,912,658	33,039,048	

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	32,729,262
2	Enter amount from Part I, line 27a	2	763,669
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	33,492,931
5	Decreases not included in line 2 (itemize) ▶	5	797,329
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	32,695,602

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	16,014,370		14,080,703	1,933,667
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				1,933,667
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,933,667
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	

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 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))
2013	1,505,639	31,649,755	0 047572
2012	1,442,193	28,907,288	0 049890
2011	1,451,813	28,612,812	0 050740
2010	1,107,126	26,687,801	0 041484
2009	1,179,769	23,950,337	0 049259

2	**Total** of line 1, column (d).	2	0 238945
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 047789
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	33,019,209
5	Multiply line 4 by line 3.	5	1,577,955
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	24,325
7	Add lines 5 and 6.	7	1,602,280
8	Enter qualifying distributions from Part XII, line 4.	8	1,366,470

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see 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	48,650
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	48,650
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	48,650
6	Credits/Payments				
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	72,397		
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	72,397
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	23,747
11	Enter the amount of line 10 to be **Credited to 2015 estimated tax** ▶ 23,747 **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 Instructions for 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.*	1b		No
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		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
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 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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? *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 instructions)	11		No
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)	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 |

			Yes	No
16	At any time during calendar year 2014, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 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 2014?	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ 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 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 2014 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 2014.)*	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 2014?	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 4945(d)(4)(A)? (see 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 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 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 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 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	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see 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 instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	32,710,257
b	Average of monthly cash balances	1b	779,677
c	Fair market value of all other assets (see instructions)	1c	32,106
d	**Total** (add lines 1a, b, and c)	1d	33,522,040
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	33,522,040
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	502,831
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	33,019,209
6	**Minimum investment return.** Enter 5% of line 5	6	1,650,960

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

1	Minimum investment return from Part X, line 6	1	1,650,960
2a	Tax on investment income for 2014 from Part VI, line 5 — 2a: 48,650		
b	Income tax for 2014 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	48,650
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,602,310
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	1,602,310
6	Deduction from distributable amount (see instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	1,602,310

Part XII **Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	1,366,470
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	1,366,470
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 instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,366,470

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

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7					1,602,310
2 Undistributed income, if any, as of the end of 2014					
a Enter amount for 2013 only.				0	
b Total for prior years 20___ , 20___ , 20___			0		
3 Excess distributions carryover, if any, to 2014					
a From 2009.					
b From 2010.					
c From 2011.	45,364				
d From 2012.	53,574				
e From 2013.					
f **Total** of lines 3a through e.		98,938			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ $ 1,366,470					
a Applied to 2013, 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 2014 distributable amount.					1,366,470
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2014 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		98,938			98,938
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		0			
b Prior years' undistributed income Subtract line 4b from line 2b			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			0		
d Subtract line 6c from line 6b Taxable amount —see instructions			0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015					136,902
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 2009 not applied on line 5 or line 7 (see instructions) . . .		0			
9 **Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a		0			
10 Analysis of line 9					
a Excess from 2010. . . .					
b Excess from 2011. . . .					
c Excess from 2012. . . .					
d Excess from 2013. . . .					
e Excess from 2014. . . .					

Part XIV **Private Operating Foundations** (see 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 2014, 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			
	(a) 2014	**(b)** 2013	**(c)** 2012	**(d)** 2011	**(e) Total**
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 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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or e-mail address 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

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

c Any submission deadlines

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

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

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

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 TableSee Additional Data Table				
Total . . . . ▶ 3a				1,101,635
b *Approved for future payment*				
See Additional Data Table				
Total . . . . ▶ 3b				275,000

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 instructions)
	(a) Business code	(b) Amount	(c) Exclusion 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	591,415	
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	1,652	
8 Gain or (loss) from sales of assets other than inventory			18	1,874,930	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue **a** RENTAL FEES					2,360
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		0		2,467,997	2,360

13 Total. Add line 12, columns (b), (d), and (e). **13** 2,470,357

(See worksheet in line 13 instructions 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 foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
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) is based on all information of which preparer has any knowledge

******	2015-07-28	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▸ ☐	PTIN
DAVID KELLEHER CPA		2015-07-01		P01059560

Firm's name ▸ ALEXANDER ARONSON FINNING & CO PC

Firm's EIN ▸ 04-2571780

Firm's address ▸ 21 EAST MAIN STREET WESTBORO, MA 01581

Phone no (508) 366-9100

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 NA 225 FRANKLIN STREET MA1-225-04-02 BOSTON, MA 02110	TRUSTEE 40 00	103,849	0	0
RICHARD H DAVISON 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4 00	3,600	0	0
SUSAN IULIANO 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE/CHAIRMAN 8 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	115,693	8,625	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*				
ASSOCIATED GRANT MAKERS 133 FEDERAL STREET SUITE 802 BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	5,260
APPALACHIAN MOUNTAIN CLUB 5 JOY STREET BOSTON, MA 02108		PUBLIC CHARITY	CY&F	25,000
ASSABET VALLEY COLLABORATIVE 57 ORCHARD STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	24,750
BIG BROTHERS BIG SISTERS OF CMMW 484 MAIN STREET SUITE 360 WORCESTER, MA 01608		PUBLIC CHARITY	CY&F	25,000
BOYS & GIRLS CLUB OF ASSABET VALLEY 212 GREAT ROAD MAYNARD, MA 01754		PUBLIC CHARITY	CY&F	20,000
BOYS & GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	53,825
COMMUNITIES FOR RESTORATIVE JUSTICE 219 WALDEN STREET PO BOX 65 CONCORD, MA 01742		PUBLIC CHARITY	CY&F	14,500
DANFORTH ART 123 UNION AVENUE FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	24,500
DISCOVERY MUSEUMS 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	CY&F	50,000
EMPLOYMENT OPTIONS INC 82 BRIGHAM STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	20,000
FRAMINGHAM PUBLIC LIBRARYECAF 49 LEXINGTON STREET FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	15,000
INFANT AND TODDLER CHILDREN'S CENTER 149 CENTRAL STREET ACTON, MA 01720		PUBLIC CHARITY	CY&F	10,000
JEFF'S PLACE 34 DELOSS STREET 2ND FLOOR FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	25,000
JOHN ANDREW MAZIE MEMORIAL FOUNDATION 1502 WISTERIA WAY WAYLAND, MA 01778		PUBLIC CHARITY	CY&F	4,500
MASSACHUSETTS BAY COMMUNITY COLLEGE FOUNDATION 50 OAKLAND STREET WELLESLEY, MA 02481		PUBLIC CHARITY	CY&F	25,000
Total . . . . ▶ 3a				1,101,635

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*				
JRIMETRO WEST EMOTIONAL HEALTH AND SUBSTANCE ABUSE TASK FORCE 160 GOULD STREET NEEDHAM, MA 02494		PUBLIC CHARITY	CY&F	1,000
NATURE CONNECTION 40 STOW STREET PO BOX 155 CONCORD, MA 01742		PUBLIC CHARITY	CY&F	25,000
ONE CAN HELP INC PO BOX 56 NEWTON, MA 02468		PUBLIC CHARITY	CY&F	6,000
PARTNERSHIPS FOR A SKILLED WORKFORCE INC 420 LAKESIDE AVENUE SUITE 301 MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	25,000
REACH BEYOND DOMESTIC VIOLENCE PO BOX 540024 WALTHAM, MA 02454		PUBLIC CHARITY	CY&F	17,480
THE LEARNING CENTER FOR THE DEAF 848 CENTRAL STREET FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	20,000
WAYSIDE YOUTH & FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	18,080
COBSCOOK BAY RESOURCE CENTER 4 FAVOR STREET EASTPORT, ME 04631		PUBLIC CHARITY	ENVIRONMENT	25,000
NEW ENGLAND GRASSROOTS ENVIRONMENT FUND PO BOX 611 NEWMARKET, NH 03857		PUBLIC CHARITY	ENVIRONMENT	40,000
PENOBSCOT EAST RESOURCE CENTER PO BOX 27 13 ATLANTIC AVENUE STONINGTON, ME 04681		PUBLIC CHARITY	ENVIRONMENT	40,000
FOUNDATION FOR METROWEST 3 ELIOT STREET NATICK, MA 01760		PUBLIC CHARITY	SUDBURY	15,000
GAINING GROUND INC PO BOX 374 CONCORD, MA 01741		PUBLIC CHARITY	SUDBURY	5,000
GOODNOW LIBRARY FOUNDATION INC 21 CONCORD ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	40,000
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	7,500
LONGFELLOW'S WAYSIDE INN 72 WAYSIDE INN ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	100,000
Total . . . . ▶ **3a**				1,101,635

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*				
METROWEST LEGAL SERVICES 63 FOUNTAIN STREET SUITE 304 FRAMINGHAM,MA 01702		PUBLIC CHARITY	SUDBURY	2,500
SMILE MASS INC 66 DUDLEY ROAD SUDBURY,MA 01776		PUBLIC CHARITY	SUDBURY	5,000
SUDBURY ANCIENT FYFE AND DRUM CO PO BOX 93 SUDBURY,MA 01776		PUBLIC CHARITY	SUDBURY	3,000
SUDBURY COMMUNITY FOOD PANTRY 160 CONCORD ROAD SUDBURY,MA 01776		PUBLIC CHARITY	SUDBURY	500
SUDBURY HISTORICAL SOCIETY 322 CONCORD ROAD 2ND FLOOR TOWN SUDBURY,MA 01776		PUBLIC CHARITY	SUDBURY	50,000
SUDBURY WAYLAND LINCOLN DOMESTIC VIOLENCE ROUNDTABLE PO BOX 543 SUDBURY,MA 01776		PUBLIC CHARITY	SUDBURY	2,000
SWEET INC 21 WHITETAIL LANE SUDBURY,MA 01776		PUBLIC CHARITY	SUDBURY	1,050
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY,MA 01776		MUNICIPALITY	SUDBURY	5,000
TOWN OF SUDBURY - COUNCIL ON AGING 278 OLD SUDBURY ROAD SUDBURY,MA 01776		MUNICIPALITY	SUDBURY	18,000
MOLLY BANKUTI 170 HAYNES ROAD SUDBURY,MA 01776		INDIVIDUAL	SCHOLARSHIP	3,190
OLIVIA BANKUTI 170 HAYNES ROAD SUDBURY,MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KATHERINE BARKER 32 MOORE ROAD SUDBURY,MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
JONATHAN CARBUTT 157 MAYNARD ROAD SUDBURY,MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
LIAM CARBUTT 157 MAYNARD ROAD SUDBURY,MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
JAMIE CHAREST 50 NORMANDY DRIVE SUDBURY,MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
Total . . . . ▶ **3a**				1,101,635

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*				
CASSANDRA CHISLOM 349 PARK STREET APT 3 DORCHESTER, MA 02124		INDIVIDUAL	SCHOLARSHIP	5,000
LAUREN CHUNIAS 61 KING PHILIP ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KASEY COLPITTS 284 MOSSMAN ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
PATRICIA CORDISCHI 178 WOODSIDE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ISAAC FELDBERG 24 PEAKHAM ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ANTHONY FOSCOLOS 7 PRATTS MILL ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
NATHAN GALLOWAY 11 ANTRIM ROAD FRAMINGHAM, MA 01701		INDIVIDUAL	SCHOLARSHIP	5,000
SYDNEY GENEROSO 6 COLBURN CIRCLE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MATTHEW GOFF 18 LYNNE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KEVIN GORMAN 15 WAKE ROBIN ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MEGAN GREENLAW 24 SADDLE RIDGE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MEGAN GRIFFIN 7 ALLENE AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
MADISON HEREL 25 RAMBLING ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
AMANDA HUTCHINSON 7 GRANT ROAD WESTBOROUGH, MA 01581		INDIVIDUAL	SCHOLARSHIP	7,500
AMANDA IRVINE 2 ELIOT ROAD NORTHBOROUGH, MA 01532		INDIVIDUAL	SCHOLARSHIP	5,000
Total . . . . ▶ **3a**				1,101,635

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*				
ANDREW JACOBS 4 CROWN POINT ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
LAUREN JACOBS 4 CROWN POINT ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
NATHANIEL JOHNSON 11 OCTOBER ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KRYSTAL KALLARACKAL 405 PEAKHAM ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
RACHEL LAM 1166 CHARMWOOD COURT SUNNYVALE, CA 94089		INDIVIDUAL	SCHOLARSHIP	2,500
GUISEPPE LEONELLI 148 HAYNES ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
EMILY LIANG 7 BARTON DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
YARASLAU LOBAN 35 WELLS ROAD LINCOLN, MA 01773		INDIVIDUAL	SCHOLARSHIP	5,000
RYAN MCAVOY 9 MORGAN DRIVE UNIT 305 NATICK, MA 01760		INDIVIDUAL	SCHOLARSHIP	5,000
DEVON MCCANN 60 HAYNES ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
HALEY NEIL 34 MAPLE AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
BRIAN POLLOCK 16 LYMAN AVENUE HUDSON, MA 01749		INDIVIDUAL	SCHOLARSHIP	7,500
JASON PORTER 42 SURREY LANE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ROBYN RALLI 561 HUDSON ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ALEXANDRA RAMSAY 15 CHURCHILL STREET SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
Total . . . . ▶ 3a				1,101,635

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*				
ANELISE RAMSAY 15 CHURCHILL STREET SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ROSEMARY RUST 177 HAYNES ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
JACQUELINE SANDERSON 15 SYCAMORE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
VICTORIA SANDERSON 15 SYCAMORE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
FERGAL SEIFERTH 11 LYMAN TERRACE WALTHAM, MA 02452		INDIVIDUAL	SCHOLARSHIP	5,000
MATTHEW SHELLEY 30 SAXONY DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
RYAN SHELLEY 30 SAXONY DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ANA SILVA 4 RAYNOR ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
LAWRENCE STEVENSON 127 WEST HIGH STREET AVON, MA 02322		INDIVIDUAL	SCHOLARSHIP	5,000
REGAN STUBBS 28 BENT BROOK ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ERINA TARADAI 43 WILLIS LAKE DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
CECILIA THAI 45 PINEWOOD AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KATHRYN THOMAS 203 MARLBORO ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
VICTORIA VANARIA 724 CONCORD ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
CAMERON WAGGENER 61 MAYNARD FARM ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	6,500
Total . . . . ▶ **3a**				1,101,635

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*				
NEIL WEI 45 OAKWOOD AVENUE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
ALISHA WEINSTEIN 42 VILLAGE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
SUZANNE WEISBERG 18 WHISPERING PINE ROAD SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
KATELYN WRIGHT 19 LORING AVENUE MAYNARD, MA 01754		INDIVIDUAL	SCHOLARSHIP	5,000
CONNOR YOUNG 22 WITHERELL DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
RYAN YOUNG 22 WITHERELL DRIVE SUDBURY, MA 01776		INDIVIDUAL	SCHOLARSHIP	5,000
Total . . . . ▶ **3a**				1,101,635

TY 2014 Accounting Fees Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	19,562	1,956	0	17,606

TY 2014 Investments Corporate Bonds Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	6,742,915	6,742,915

TY 2014 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	19,598,706	19,598,706
PRIVATE EQUITY FUNDS	AT COST	504,532	504,532
REAL ESTATE INVESTMENT TRUST FUND	AT COST	1,995,435	1,995,435
COMMODITIES	AT COST	1,940,479	1,940,479

TY 2014 Land, Etc. Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER	2,684	2,684	0	
BUILDING	1,182,714	137,982	1,044,732	1,044,732
OFFICE FURNITURE	23,912	18,134	5,778	5,778
APPLIANCES	1,242	942	300	300
MEETING FURNITURE	5,964	4,523	1,441	1,441
WINDOW TREATMENTS	4,200	3,185	1,015	1,015
OFFICE LAMPS	730	541	189	189
INTERIOR DESIGN	1,500	1,087	413	413
BABIN LANDSCAPING	2,570	1,563	1,007	1,007
LAND	49,885	0	49,885	49,885
IMAC COMPUTER	2,249	900	1,349	1,349

TY 2014 Other Decreases Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Description	Amount
UNREALIZED LOSS ON INVESTMENTS	797,329

TY 2014 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	22,840	0	0	22,840
OTHER EXPENSES RELATING TO PEP INVESTMENTS K-1	0	12,610	0	0

TY 2014 Other Income Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	1,652	1,652	
RENTAL FEES	2,360		2,360

TY 2014 Other Liabilities Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED TAXES PAYABLE	81,996	66,050

TY 2014 Other Professional Fees Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER PROFESSIONAL CONSULTANTS	5,987	0	0	5,987

TY 2014 Taxes Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	32,704	0	0	0
PAYROLL TAXES	10,874	0	0	10,874
STATE FILING FEE	730	0	0	730
FOREIGN TAXES	0	526	0	0