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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

2017

Open to Public Inspection

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

Name of foundation
THE SUDBURY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
326 CONCORD RD

City or town, state or province, country, and ZIP or foreign postal code
SUDBURY, MA 01776

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

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) \$ 34,694,025

J Accounting method

☐ Cash

☒ Accrual

☐ Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number
04-6037026

B Telephone number (see instructions)
(978) 443-0849

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

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	593,037	624,418		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	2,768,098			
	b Gross sales price for all assets on line 6a				
		18,721,768			
	7 Capital gain net income (from Part IV, line 2)		3,237,621		
	8 Net short-term capital gain				
	9 Income modifications			13,000	
Operating and Administrative Expenses	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)	16,453	0	0	
	12 Total. Add lines 1 through 11	3,377,588	3,862,039	13,000	
	13 Compensation of officers, directors, trustees, etc	253,784	126,688	0	127,096
	14 Other employee salaries and wages	47,700	0	0	47,700
	15 Pension plans, employee benefits	10,041	0	0	9,712
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	20,806	2,080	0	18,726
	c Other professional fees (attach schedule)	5,299	0	0	5,299
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	48,163	0	0	13,413
	19 Depreciation (attach schedule) and depletion	20,768	0	0	
	20 Occupancy	34,355	0	0	34,355
	21 Travel, conferences, and meetings	3,242	0	0	3,242
22 Printing and publications					
23 Other expenses (attach schedule)	16,507	0	0	16,507	
24 Total operating and administrative expenses. Add lines 13 through 23	460,665	128,768	0	276,050	
25 Contributions, gifts, grants paid	1,517,753			1,423,253	
26 Total expenses and disbursements. Add lines 24 and 25	1,978,418	128,768	0	1,699,303	
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,399,170			
	b Net investment income (if negative, enter -0-)		3,733,271		
c Adjusted net income (if negative, enter -0-)			13,000		

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2017)

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	15,209	14,944	14,944
	2 Savings and temporary cash investments	481,573	769,321	769,321
	3 Accounts receivable ▶ <u>6,404</u>			
	Less allowance for doubtful accounts ▶ _____	6,301	6,404	6,404
	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	33,754	1,419	1,419
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)	7,544,196	6,025,986	6,025,986
	11 Investments—land, buildings, and equipment basis ▶ _____			
Less accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	22,220,065	26,828,118	26,828,118	
14 Land, buildings, and equipment basis ▶ <u>1,284,989</u>				
Less accumulated depreciation (attach schedule) ▶ <u>237,156</u>	1,066,233	1,047,833	1,047,833	
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	31,367,331	34,694,025	34,694,025	
Liabilities	17 Accounts payable and accrued expenses	2,404		
	18 Grants payable	40,000	132,000	
	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 ▶ _____)	43,486	42,631	
	23 Total liabilities (add lines 17 through 22)	85,890	174,631	
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	31,281,441	34,519,394	
	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)	31,281,441	34,519,394	
	31 Total liabilities and net assets/fund balances (see instructions) .	31,367,331	34,694,025	

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	31,281,441
2 Enter amount from Part I, line 27a	2	1,399,170
3 Other increases not included in line 2 (itemize) ▶ _____	3	1,838,783
4 Add lines 1, 2, and 3	4	34,519,394
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	34,519,394

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 18,721,768		15,484,147	3,237,621
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			3,237,621
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	3,237,621
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))
2016	1,374,319	29,630,784	0 046381
2015	1,481,959	30,990,150	0 047820
2014	1,366,470	33,019,209	0 041384
2013	1,505,639	31,649,755	0 047572
2012	1,442,193	28,907,288	0 049890

2 Total of line 1, column (d)	2	0 233047
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 046609
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	31,977,911
5 Multiply line 4 by line 3	5	1,490,458
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	37,333
7 Add lines 5 and 6	7	1,527,791
8 Enter qualifying distributions from Part XII, line 4	8	1,699,303

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 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	37,333
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	37,333
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	37,333
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	38,754
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	0
7	Total credits and payments. Add lines 6a through 6d.	7	38,754
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	2
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	1,419
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ 1,419 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)? <i>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</i>	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? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T</i>	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? <i>If "Yes," complete Part II, col (c), and Part XV</i>	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? <i>If "No," attach explanation</i> .	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 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	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? Website address WWW.SUDBURYFOUNDATION.ORG	13	Yes	
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 2017, 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? 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 ▶	16	Yes No

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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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
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 2017? ☐ 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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ 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 2017 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 2017). ☐ Yes ☒ No 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 2017? 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		
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
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? <i>If "Yes" to 6b, file Form 8870</i>		6b	No
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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) 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	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				

Total number of other employees paid over \$50,000. **0****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	31,885,038
b	Average of monthly cash balances.	1b	539,688
c	Fair market value of all other assets (see instructions).	1c	40,158
d	Total (add lines 1a, b, and c).	1d	32,464,884
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	32,464,884
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	486,973
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	31,977,911
6	Minimum investment return. Enter 5% of line 5.	6	1,598,896

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	1,598,896
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	37,333
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	37,333
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,561,563
4	Recoveries of amounts treated as qualifying distributions.	4	13,000
5	Add lines 3 and 4.	5	1,574,563
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	1,574,563

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	1,699,303
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	1,699,303
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	37,333
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,661,970

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				1,574,563
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			262,963	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2017				
a From 2012.				
b From 2013.				
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>1,699,303</u>				
a Applied to 2016, but not more than line 2a			262,963	
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 2017 distributable amount.				1,436,340
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	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 2016 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				138,223
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 2012 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2013.				
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.				

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 2017, 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)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	1,423,253
b <i>Approved for future payment</i>				
Total			3b	0

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	
Enter gross amounts unless otherwise indicated				
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	593,037	
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	1,303	
8 Gain or (loss) from sales of assets other than inventory		18	2,768,098	
9 Net income or (loss) from special events				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue				
a RENTAL FEES _____				2,150
b RETURNED GRANT FUNDS _____				13,000
c _____				
d _____				
e _____				
12 Subtotal Add columns (b), (d), and (e). .	0		3,362,438	15,150
13 Total. Add line 12, columns (b), (d), and (e).		13		3,377,588

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

[illegible]

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
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.		
	*****	2018-07-16	*****
	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		2018-07-10		P01059560
	Firm's name ▶ ALEXANDER ARONSON FINNING & CO PC				Firm's EIN ▶ 04-2571780
Firm's address ▶ 50 WASHINGTON STREET WESTBOROUGH, 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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
BANK OF AMERICA MA1-225-04-02 225 FRANKLIN STREET BOSTON, MA 02110	TRUSTEE 40 00	126,688	0	0
MINER CRARY 326 CONCORD ROAD SUDBURY, MA 01776				
STEPHEN RICHMOND 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE 4 00	0	0	0
SUSAN IULIANO 326 CONCORD ROAD SUDBURY, MA 01776				
JILL STANSKY 326 CONCORD ROAD SUDBURY, MA 01776	TRUSTEE/CHAIR 8 00	0	0	0
MARILYN MARTINO 326 CONCORD ROAD SUDBURY, MA 01776		127,096	9,712	0

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ACCEPT EDUCATION COLLABORATIVE 220 NORTH MAIN STREET SUITE 201 NATICK, MA 01760		PUBLIC CHARITY	CY&F	19,200
BETHANY HILL PLACE89 BETHANY ROAD FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	5,000
BIG BROTHERS BIG SISTERS OF CMMW 484 MAIN STREET SUITE 360 WORCESTER, MA 01608		PUBLIC CHARITY	CY&F	25,000
BIRTHDAY WISHES INCPO BOX 590645 NEWTON, MA 02459		PUBLIC CHARITY	CY&F	5,000
BOYS & GIRLS CLUBS OF METROWEST 169 PLEASANT STREET MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	100,000
Total ► 3a				1,423,253

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DOC WAYNE YOUTH SERVICES INC 418 COMMONWEALTH AVENUE BOSTON, MA 02215		PUBLIC CHARITY	CY&F	25,000
FAMILY PROMISE METROWEST 13 COMMON STREET NATICK, MA 01760		PUBLIC CHARITY	CY&F	10,000
FRAMINGHAM POLICE DEPARTMENT 1 WILLIAM H WELCH WAY FRAMINGHAM, MA 01702		MUNICIPALITY	CY&F	25,000
FRAMINGHAM STATE UNIV FDNMW COLLEGE PLANNING CENTER 13 SALEM END ROAD 1812 HOUSE FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	22,000
HOOPS AND HOMEWORK 56 AGNES DRIVE FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	5,000
Total 				1,423,253
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HOOPS AND HOMEWORK 56 AGNES DRIVE FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	16,500
JEFF'S PLACE 34 DELOSS STREET 2ND FLOOR FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	20,500
JEWISH FAMILY SERVICE OF METROWEST 475 FRANKLIN STREET SUITE 101 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	8,500
JOHN ANDREW MAZIE MEMORIAL FOUNDATION 1502 WISTERIA WAY WAYLAND, MA 01778		PUBLIC CHARITY	CY&F	25,000
LOVELANE SPECIAL NEEDS HORSEBACK RIDING PROGRAM INC 40 BAKER BRIDGE ROAD LINCOLN, MA 01773		PUBLIC CHARITY	CY&F	18,200
Total 3a				1,423,253

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
METROWEST LEGAL SERVICES 63 FOUNTAIN STREET SUITE 304 FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	25,000
MIDDLESEX PARTNERSHIPS FOR YOUTH INC 467 MAIN STREET WAKEFIELD, MA 01880		PUBLIC CHARITY	CY&F	5,000
ONE CAN HELP INCPO BOX 55 NEWTON, MA 02468		PUBLIC CHARITY	CY&F	4,250
OUT METROWESTPO BOX 2122 FRAMINGHAM, MA 01703		PUBLIC CHARITY	CY&F	18,500
PARTNERSHIPS FOR A SKILLED WORKFORCE INC 420 LAKESIDE AVENUE SUITE 301 MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	25,000
Total ▶ 3a				1,423,253

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
REACH BEYOND DOMESTIC VIOLENCE PO BOX 540024 WALTHAM, MA 02454		PUBLIC CHARITY	CY&F	7,470
SPARK KINDNESS14 SAWIN STREET NATICK, MA 01760		PUBLIC CHARITY	CY&F	24,000
TALY FOUNDATION INC 665 FRANKLIN ST UPPER LEVEL FRAMINGHAM, MA 01702		PUBLIC CHARITY	CY&F	20,000
THE DISCOVERY MUSEUMS 177 MAIN STREET ACTON, MA 01720		PUBLIC CHARITY	CY&F	4,000
THRIVE SUPPORT AND ADVOCACY INC 65 BOSTON POST ROAD WEST SUITE 220 MARLBOROUGH, MA 01752		PUBLIC CHARITY	CY&F	10,950
Total 				1,423,253
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WAYSIDE YOUTH & FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM, MA 01701		PUBLIC CHARITY	CY&F	9,665
WILDFLOWER INC 271 LINCOLN STREET SUITE 12 LEXINGTON, MA 02421		PUBLIC CHARITY	CY&F	10,000
ASSOCIATED GRANT MAKERS 133 FEDERAL STREET SUITE 802 BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	5,360
MASSACHUSETTS BUSINESS ALLIANCE FOR EDUCATION 400 ATLANTIC AVENUE BOSTON, MA 02110		PUBLIC CHARITY	COMMUNITY	10,000
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE ONE SUGARLOAF STREET S DEERFIELD, MA 01373		PUBLIC CHARITY	ENVIRONMENT	25,000
Total 				1,423,253
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONSERVATION LAW FOUNDATION 62 SUMMER STREET BOSTON, MA 02110		PUBLIC CHARITY	ENVIRONMENT	34,000
FRANKLIN COUNTY CDCFISCAL AGENT FOR MA FOOD SYSTEM COLLABORATIVE 324 WELLS STREET GREENFIELD, MA 01301		PUBLIC CHARITY	ENVIRONMENT	25,000
GAINING GROUND INCPO BOX 374 CONCORD, MA 01742		PUBLIC CHARITY	ENVIRONMENT	25,000
LOVIN' SPOONFULS 367 WESTERN AVENUE BRIGHTON, MA 02135		PUBLIC CHARITY	ENVIRONMENT	25,000
MASS DEPT OF TRANSITIONAL ASSISTANCE - HIP 143 MUNSON STREET UNIT 3 GREENFIELD, MA 01301		MUNICIPALITY	ENVIRONMENT	25,000
Total ► 3a				1,423,253

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MILL CITY GROWSPO BOX 7133 LOWELL, MA 01852		PUBLIC CHARITY	ENVIRONMENT	25,000
NEW ENTRY SUSTAINABLE FARMING PROJECT 45 MERRIMACK STREET SUITE 500 LOWELL, MA 01852		PUBLIC CHARITY	ENVIRONMENT	25,000
THE CARROT PROJECT 89 SOUTH STREET 7TH FLOOR BOSTON, MA 02111		PUBLIC CHARITY	ENVIRONMENT	34,000
ADVOCATES INC 1881 WORCESTER ROAD FRAMINGHAM, MA 01701		PUBLIC CHARITY	SUDBURY	20,300
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL 390 LINCOLN ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	7,500
Total 				1,423,253
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
METROWEST FREE MEDICAL PROGRAM 105 HUDSON ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	1,200
ORGANIZATION FOR THE ASSABET SUDBURY & CONCORD RIVERS 23 BRADFORD STREET CONCORD, MA 01742		PUBLIC CHARITY	SUDBURY	5,000
FOUNDATION FOR METROWEST 3 ELIOT STREET NATICK, MA 01760		PUBLIC CHARITY	SUDBURY	15,000
SUDBURY HISTORICAL SOCIETY 322 CONCORD ROAD 2ND FLOOR TOWN HALL SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	200,000
SUDBURY UNITED METHODIST CHURCH 251 OLD SUDBURY ROAD SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	25,000
Total ► 3a				1,423,253

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SWEET INC21 WHITETAIL LANE SUDBURY, MA 01776		PUBLIC CHARITY	SUDBURY	545
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	1,650
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	17,000
TOWN OF SUDBURY 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	31,250
TOWN OF SUDBURY - COUNCIL ON AGING 278 OLD SUDBURY ROAD SUDBURY, MA 01776		MUNICIPALITY	SUDBURY	15,000
Total ► 3a				1,423,253

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN UNIVERSITY 4400 MASSACHUSETTS AVENUE NW WASHINGTON, DC 20016		SCHOLARSHIP	SCHOLARSHIP	5,000
BATES COLLEGE44 MOUNTAIN AVENUE LEWISTON, ME 04240		SCHOLARSHIP	SCHOLARSHIP	5,000
BENTLEY UNIVERSITY 175 FOREST STREET WALTHAM, MA 02452		SCHOLARSHIP	SCHOLARSHIP	5,000
BENTLEY UNIVERSITY 175 FOREST STREET WALTHAM, MA 02452		SCHOLARSHIP	SCHOLARSHIP	5,000
BOSTON COLLEGE LYONS HALL 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ▶				1,423,253
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON COLLEGE LYONS HALL 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467		SCHOLARSHIP	SCHOLARSHIP	5,000
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000
BOSTON UNIVERSITY 881 COMMONWEALTH AVENUE BOSTON, MA 02215		SCHOLARSHIP	SCHOLARSHIP	5,000
BOWDOIN COLLEGE 5300 COLLEGE STATION BRUNSWICK, ME 04011		SCHOLARSHIP	SCHOLARSHIP	5,000
Total 				1,423,253
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453		SCHOLARSHIP	SCHOLARSHIP	5,000
BRIGHAM YOUNG UNIVERSITY FINANCIAL AID OFFICE A-41 ASB PROVO, UT 84602		SCHOLARSHIP	SCHOLARSHIP	5,000
BRIGHAM YOUNG UNIVERSITY FINANCIAL AID OFFICE A-41 ASB PROVO, UT 84602		SCHOLARSHIP	SCHOLARSHIP	5,000
BROWN UNIVERSITY BOX 1827 69 BROWN STREET PROVIDENCE, RI 02912		SCHOLARSHIP	SCHOLARSHIP	5,000
BRYN MAWR COLLEGE BENHAM GATEWAY 101 NORTH MERION AVENUE BRYN MAWR, PA 19010		SCHOLARSHIP	SCHOLARSHIP	5,000
Total 				1,423,253
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CASE WESTERN RESERVE UNIVERSITY PO BOX 614 CHESTERTON, IN 46304		SCHOLARSHIP	SCHOLARSHIP	5,000
COLUMBIA UNIVERSITY 2920 BROADWAY NEW YORK, NY 10027		SCHOLARSHIP	SCHOLARSHIP	5,000
CONNECTICUT COLLEGE 270 MOHEGAN AVENUE NEW LONDON, CT 06320		SCHOLARSHIP	SCHOLARSHIP	5,000
CORNELL UNIVERSITY203 DAY HALL ITHACA, NY 14850		SCHOLARSHIP	SCHOLARSHIP	5,000
DARTMOUTH COLLEGE 6024 MCNUTT HALL HANOVER, NH 03755		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ▶ 3a				1,423,253

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DARTMOUTH COLLEGE 6024 MCNUTT HALL HANOVER, NH 03755		SCHOLARSHIP	SCHOLARSHIP	5,000
DREXEL UNIVERSITY SUITE 106 MAIN BUILDING 3141 CHESTNUT STREET PHILADELPHIA, PA 19104		SCHOLARSHIP	SCHOLARSHIP	5,000
EMORY UNIVERSITY BOISFEUILLET JONES CTR STE 300 200 DOWMAN DR ATLANTA, GA 30322		SCHOLARSHIP	SCHOLARSHIP	5,000
FRAMINGHAM STATE UNIVERSITY 100 STATE STREET FRAMINGHAM, MA 01701		SCHOLARSHIP	SCHOLARSHIP	5,000
FRAMINGHAM STATE UNIVERSITY 100 STATE STREET PO BOX 9101 FRAMINGHAM, MA 01701		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ► 3a				1,423,253

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GEORGE WASHINGTON UNIVERSITY 800 21ST STREET NW MARVIN CENTER GROUND FLOOR WASHINGTON, DC 20052		SCHOLARSHIP	SCHOLARSHIP	5,000
GEORGIA INSTITUTE OF TECHNOLOGY 225 NORTH AVENUE ATLANTA, GA 30332		SCHOLARSHIP	SCHOLARSHIP	2,500
GETTYSBURG COLLEGE CAMPUS BOX 438 300 N WASHINGTON STREET GETTYSBURG, PA 17325		SCHOLARSHIP	SCHOLARSHIP	5,000
HOFSTRA UNIVERSITY 206 MEMORIAL HALL HEMPSTEAD, NY 11549		SCHOLARSHIP	SCHOLARSHIP	5,000
HOFSTRA UNIVERSITY 206 MEMORIAL HALL HEMPSTEAD, NY 11549		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ► 3a				1,423,253

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HOWARD UNIVERSITY 2400 6TH ST NW 205 WASHINGTON, DC 20059		SCHOLARSHIP	SCHOLARSHIP	5,000
INSTITUTE FOR SHIPBOARD EDUCATION 2243 CENTRE AVE 300 FORT COLLINS, CO 80526		SCHOLARSHIP	SCHOLARSHIP	2,500
LEHIGH UNIVERSITY THE BARNETT HOUSE 218 WEST PACKER AVENUE BETHLEHEM, PA 18015		SCHOLARSHIP	SCHOLARSHIP	5,000
LOYOLA UNIVERSITY KNOTT HUMANITIES CTR 211A 4501 N CHARLES ST BALTIMORE, MD 21210		SCHOLARSHIP	SCHOLARSHIP	5,000
MASS COLLEGE OF ART 621 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ► 3a				1,423,253

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MASS COLLEGE OF PHARMACY 179 LONGWOOD AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000
MASSACHUSETTS INSTITUTE OF TECHNOLOGY FINANCIAL AID OFFICE A-41 ASB CAMBRIDGE, MA 02139		SCHOLARSHIP	SCHOLARSHIP	5,000
MASSACHUSETTS INSTITUTE OF TECHNOLOGY FINANCIAL AID OFFICE A-41 ASB CAMBRIDGE, MA 02139		SCHOLARSHIP	SCHOLARSHIP	5,000
MIAMI UNIVERSITY OF OHIO 501 E HIGH STREET OXFORD, OH 45056		SCHOLARSHIP	SCHOLARSHIP	5,000
MIDDLEBURY COLLEGE 84 SOUTH SERVICE ROAD MIDDLEBURY, VT 05753		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ► 3a				1,423,253

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Name and address (home or business)				
a <i>Paid during the year</i>				
MIDDLEBURY COLLEGE 84 SOUTH SERVICE ROAD MIDDLEBURY, VT 05753		SCHOLARSHIP	SCHOLARSHIP	5,000
NEW YORK UNIVERSITY 25 WEST 4TH STREET NEW YORK, NY 10012		SCHOLARSHIP	SCHOLARSHIP	5,000
NORTHEASTERN UNIVERSITY 354 RICHARDS HALL 360 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000
NORTHEASTERN UNIVERSITY 354 RICHARDS HALL 360 HUNTINGTON AVENUE BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	5,000
NOTRE DAME UNIVERSITY 115 MAIN BUILDING NOTRE DAME, IN 46556		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ► 3a				1,423,253

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Name and address (home or business)				
a <i>Paid during the year</i>				
NOTRE DAME UNIVERSITY 115 MAIN BUILDING NOTRE DAME, IN 46556		SCHOLARSHIP	SCHOLARSHIP	5,000
POINT PARK UNIVERSITY 201 WOOD STREET 121 THAYER HALL PITTSBURGH, PA 15222		SCHOLARSHIP	SCHOLARSHIP	5,000
STANFORD UNIVERSITY MONTAG HALL 355 GALVEZ STREET STANFORD, CA 94305		SCHOLARSHIP	SCHOLARSHIP	5,000
TUFTS UNIVERSITY DOWLING HALL 419 BOSTON AVENUE MEDFORD, MA 02155		SCHOLARSHIP	SCHOLARSHIP	5,000
TUFTS UNIVERSITY DOWLING HALL 419 BOSTON AVENUE MEDFORD, MA 02155		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ► 3a				1,423,253

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
TULANE UNIVERSITY 6823 SAINT CHARLES AVENUE NEW ORLEANS, LA 70118		SCHOLARSHIP	SCHOLARSHIP	5,000
UNIVERSITY OF CALIFORNIA BERKELEY 5440D STUDENT SERVICES BUILDING 1900 BERKELEY, CA 94720		SCHOLARSHIP	SCHOLARSHIP	5,000
UNIVERSITY OF DENVER UNIVERSITY HALL 255 2197 S UNIVERSITY BLVD DENVER, CO 80208		SCHOLARSHIP	SCHOLARSHIP	5,000
UNIVERSITY OF MAINE ORONO 5781 WINGATE HALL ORONO, ME 04469		SCHOLARSHIP	SCHOLARSHIP	2,500
UNIVERSITY OF MARYLAND 0102 LEE BUILDING 7809 REGENTS DRIVE COLLEGE PARK, MD 20742		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ▶ 3a				1,423,253

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF MASSACHUSETTS AMHERST 255 WHITMORE ADMINISTRATIVE BLDG AMHERST, MA 01003		SCHOLARSHIP	SCHOLARSHIP	5,000
UNIVERSITY OF MICHIGAN 2500 STUDENT ACITVITIES BLDG 5151 E JEFFERSON ST ANN ARBOR, MI 48109		SCHOLARSHIP	SCHOLARSHIP	5,000
UNIVERSITY OF NEW HAMPSHIRE 11 GARRISON AVENUE DURHAM, NH 03824		SCHOLARSHIP	SCHOLARSHIP	2,500
UNIVERSITY OF ROCHESTER PO BOX 270261 ROCHESTER, NY 14627		SCHOLARSHIP	SCHOLARSHIP	5,000
UNIVERSITY OF ROCHESTER PO BOX 270261 ROCHESTER, NY 14627		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ▶ 3a				1,423,253

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY STUDIES ABROAD CONSORTIUM 1664 NORTH VIRGINIA STREET RENO, NV 89557		SCHOLARSHIP	SCHOLARSHIP	2,500
WAKE FOREST UNIVERSITY PO BOX 7246 REYNOLDA HALL ROOM 4 WINSTONSALEM, NC 27109		SCHOLARSHIP	SCHOLARSHIP	5,000
WASHINGTON UNIVERSITY IN ST LOUIS CAMPUS BOX 1041 ONE BROOKINGS DRIVE ST LOUIS, MO 63130		SCHOLARSHIP	SCHOLARSHIP	5,000
BRIGHAM YOUNG UNIVERSITYA-153ASB PROVO, UT 84602		SCHOLARSHIP	SCHOLARSHIP	2,500
ITHACA COLLEGE953 DANBY ROAD ITHACA, NY 14850		SCHOLARSHIP	SCHOLARSHIP	2,500
Total ▶ 3a				1,423,253

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORTHEASTERN UNIVERSITY 360 HUNTINGTON AVENUE 354 RICHARDS HALL BOSTON, MA 02115		SCHOLARSHIP	SCHOLARSHIP	2,500
THE EARTHWATCH INSTITUTE 114 WESTERN AVENUE BOSTON, MA 02134		SCHOLARSHIP	SCHOLARSHIP	2,500
GLOBAL BRIGADES 1099 E CHAMPLAIN DR STE A176 FRESNO, CA 93720		SCHOLARSHIP	SCHOLARSHIP	1,980
UNITED PLANET256 MARGINAL STREET BOSTON, MA 02128		SCHOLARSHIP	SCHOLARSHIP	2,505
INSTITUTE FOR SHIPBOARD EDUCATION 2243 CENTRE AVE 300 FORT COLLINS, CO 80526		SCHOLARSHIP	SCHOLARSHIP	2,228
Total ► 3a				1,423,253

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON COLLEGE LYONS HALL 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467		SCHOLARSHIP	SCHOLARSHIP	2,500
MCGILL UNIVERSITY 3600 MCTAVISH STREET SUITE 3200 MONTREAL, QUEBEC CA		SCHOLARSHIP	SCHOLARSHIP	5,000
UNIVERSITY OF TORONTO 172 ST GEORGE STREET TORONTO, ONTARIO CA		SCHOLARSHIP	SCHOLARSHIP	5,000
Total ▶ 3a				1,423,253

TY 2017 Accounting Fees Schedule**Name:** THE SUDBURY FOUNDATION**EIN:** 04-6037026**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	20,806	2,080	0	18,726

TY 2017 Investments Corporate Bonds Schedule

Name: THE SUDBURY FOUNDATION

EIN: 04-6037026

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	6,025,986	6,025,986

TY 2017 Investments - Other Schedule**Name:** THE SUDBURY FOUNDATION**EIN:** 04-6037026**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	AT COST	25,137,715	25,137,715
PRIVATE EQUITY FUNDS	AT COST	617,380	617,380
COMMODITIES	AT COST	1,073,023	1,073,023

TY 2017 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	189,727	992,987	992,987
OFFICE FURNITURE	23,912	23,912	0	
APPLIANCES	1,242	1,242	0	
MEETING FURNITURE	5,964	5,964	0	
WINDOW TREATMENTS	4,200	4,200	0	
OFFICE LAMPS	730	730	0	
INTERIOR DESIGN	1,500	1,500	0	
BABIN LANDSCAPING	2,570	2,334	236	236
LAND	49,885	0	49,885	49,885
IMAC COMPUTER	2,249	2,249	0	
MEETING ROOM WINDOW TREATMENTS	2,803	841	1,962	1,962
COMPUTER	2,168	1,299	869	869
COMPUTER	2,368	474	1,894	1,894

TY 2017 Other Expenses Schedule**Name:** THE SUDBURY FOUNDATION**EIN:** 04-6037026**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSES	16,507	0	0	16,507

TY 2017 Other Income Schedule**Name:** THE SUDBURY FOUNDATION**EIN:** 04-6037026**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	1,303	0	
RENTAL FEES	2,150	0	0
RETURNED GRANT FUNDS	13,000		13,000

TY 2017 Other Increases Schedule

Name: THE SUDBURY FOUNDATION
EIN: 04-6037026

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	1,838,783

TY 2017 Other Liabilities Schedule**Name:** THE SUDBURY FOUNDATION**EIN:** 04-6037026

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED TAXES PAYABLE	43,486	40,131
SCHOLARSHIPS PAYABLE	0	2,500

TY 2017 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	5,299	0	0	5,299

TY 2017 Taxes Schedule**Name:** THE SUDBURY FOUNDATION**EIN:** 04-6037026

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	34,750	0	0	0
PAYROLL TAXES	13,413	0	0	13,413