

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

For calendar year 2017 or tax year beginning 9/1/2017 **, and ending** 8/31/2018

Name of foundation
BIRD CHARLES SUMNER FDN TR U/DECL

Number and street (or P O box number if mail is not delivered to street address) Room/suite
BNY Mellon, N A - P O BOX 185

City or town, state or province, country, and ZIP or foreign postal code
Pittsburgh PA 15230-0185

Foreign country name Foreign province/state/county Foreign postal code

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) **J Accounting method** ☒ Cash ☐ Accrual
\$ 2,401,020 ☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

A Employer identification number
04-6093505

B Telephone number (see instructions)
(617) 722-7520

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)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Schedule B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	42,977	42,084		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	111,117			
b Gross sales price for all assets on line 6a	232,232			
7 Capital gain net income (from Part IV, line 2)		111,117		
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)				
12 Total. Add lines 1 through 11	154,094	153,201	0	
13 Compensation of officers, directors, trustees, etc.	22,044	13,172		8,818
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)	1,773	1,024		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	35			35
24 Total operating and administrative expenses. Add lines 13 through 23	23,852	14,196	0	8,853
25 Contributions, gifts, grants paid	102,500			102,500
26 Total expenses and disbursements. Add lines 24 and 25	126,352	14,196	0	111,353
27 Subtract line 26 from line 12	27,742			
a Excess of revenue over expenses and disbursements		139,005		
b Net investment income (if negative, enter -0-)				
c Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

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JAN 11 2019
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IRS-CSC

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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	-1,249			
	2	Savings and temporary cash investments	18,367	48,478	48,478	
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	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				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)				
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis ▶				
	Less accumulated depreciation (attach schedule) ▶					
12	Investments—mortgage loans					
13	Investments—other (attach schedule)	1,907,227	1,903,609	2,352,542		
14	Land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach schedule) ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,924,345	1,952,087	2,401,020		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	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 ▶)				
	23	Total liabilities (add lines 17 through 22)	0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds	1,924,345	1,952,087		
	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)	1,924,345	1,952,087			
31	Total liabilities and net assets/fund balances (see instructions)	1,924,345	1,952,087			

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	1,924,345
2	Enter amount from Part I, line 27a	2	27,742
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,952,087
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,952,087

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Part IV Capital Gains and Losses for Tax on Investment Income

a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Attached Statement				
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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				
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	111,117	
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	0	

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 doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	105,935	2,183,752	0.048511
2015	115,980	2,083,301	0.055671
2014	104,625	2,249,382	0.046513
2013	102,921	2,232,888	0.046093
2012	100,123	2,065,714	0.048469
2 Total of line 1, column (d)			2 0.245257
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 0.049051
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 2,370,855
5 Multiply line 4 by line 3			5 116,293
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,390
7 Add lines 5 and 6			7 117,683
8 Enter qualifying distributions from Part XII, line 4 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			8 111,353

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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 <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
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-)			0
3	Add lines 1 and 2			2,780
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)			
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			2,780
6	Credits/Payments			
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	896	
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			896
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			1,884
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			0
11	Enter the amount of line 10 to be Credited to 2018 estimated tax Refunded			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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered See instructions MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X	
14 The books are in care of ▶ BNY MELLON, N A Telephone no ▶ (617) 722-7520 Located at ▶ P O BOX 185, PITTSBURGH, PA ZIP+4 ▶ 15230-0185		
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 N/A		
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 the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 Organizations relying on a current notice regarding disaster assistance, check here ▶ <input type="checkbox"/>	1b	X
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	X

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 ☐ Yes ☒ No
- 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) N/A
- 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? ☐ Yes ☒ 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? ☐ Yes ☒ No

5b	N/A	
6b		X
7b	N/A	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, and foundation managers and their compensation. 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
BNY Mellon, N.A. P O BOX 185 Pittsburgh, PA 15230-0185	TRUSTEE SEE ATTACHED	22,044	NONE	NONE

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

▶ NONE

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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



NONE

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 NONE

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 NONE

2

All other program-related investments. See instructions.

3 NONE

Total. Add lines 1 through 3



NONE

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Part XI 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	2,338,249
b	Average of monthly cash balances	1b	68,710
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	2,406,959
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	2,406,959
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see instructions)	4	36,104
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,370,855
6	Minimum investment return. Enter 5% of line 5	6	118,543

Part XII 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	118,543
2a	Tax on investment income for 2017 from Part VI, line 5	2a	2,780
b	Income tax for 2017 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,780
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	115,763
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	115,763
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	115,763

Part XIII 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	111,353
b	Program-related investments—total from Part IX-B	1b	NONE
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	111,353
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	111,353

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				115,763
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			94,119	
b Total for prior years 20____, 20____, 20____				
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 ▶ \$ 111,353				
a Applied to 2016, but not more than line 2a			94,119	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2017 distributable amount				17,234
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
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				
d Subtract line 6c from line 6b Taxable amount—see instructions				
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				98,529
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)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
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				

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

Form 990-PF (2017)

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 Attached Statement				
Total			▶ 3a	102,500
b Approved for future payment NONE				
Total			▶ 3b	NONE

BIRD CHARLES SUMNER FDN TR U/DECL

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Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

TRURO CENTER FOR THE ARTS AT CASTLE HILL, INC

Street

10 MEETINGHOUSE RD

City

TRURO

State

MA

Zip Code

02666

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

PROVINCETOWN ART ASSOCIATION AND MUSEUM, INC

Street

460 COMMERCIAL ST

City

PROVINCETOWN

State

MA

Zip Code

02657

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

3,000

Name

NEPONSET CHORAL SOCIETY

Street

PO BOX 202

City

EAST WALPOLE

State

MA

Zip Code

02032

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

LOWER CAPE COMMUNICATIONS, INC. RE WOMR 92.1 FM

Street

494 COMMERCIAL STREET

City

PROVINCETOWN

State

MA

Zip Code

02657

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,000

Name

TRURO HISTORICAL SOCIETY

Street

13 TRURO CENTER RD

City

TRURO

State

MA

Zip Code

02666

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,000

Name

WCAI THE CAPE AND ISLANDS NPR STATION

Street

3 WATER STREET PO BOX 82

City

WOODS HOLE

State

MA

Zip Code

02543

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,000

BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 2 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

PILGRIM MONUMENT AND PROVINCETOWN MUSEUM

Street

1 HIGH POLE HILL RD

City

PROVINCETOWN

State

MA

Zip Code

02657

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,000

Name

THE TRUSTEES OF RESERVATIONS

Street

200 HIGH STREET

City

BOSTON

State

MA

Zip Code

02110

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

10,000

Name

MANOMET CENTER FOR CONSERVATION SCIENCES

Street

125 MANOMET POINT RD

City

PLYMOUTH

State

MA

Zip Code

02360

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,200

Name

LLOYD CENTER FOR ENVIRONMENTAL SCIENCE

Street

430 POTOMSKA ROAD

City

SOUTH DARTMOUTH

State

MA

Zip Code

02748

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

200

Name

CONWAY SCHOOL OF LANDSCAPE DESIGN

Street

180 PLEASANT STREET

City

EASTHAMPTON

State

MA

Zip Code

01027

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

10,000

Name

WESTPORT ART GROUP

Street

P O BOX 157

City

WESTPORT POINT

State

MA

Zip Code

02791

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

150

BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 3 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

18TH STREET ARTS CENTER

Street

1639 18TH STREET

City

SANTA MONICA

State

CA

Zip Code

90404

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,200

Name

FRESH ENERGY

Street

408 SAINT PETER STREET, SUITE 220

City

SAINT PAUL

State

MN

Zip Code

55102

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

3,000

Name

MASSACHUSETTS AUDUBON SOCIETY

Street

208 SOUTH GREAT ROAD

City

LINCOLN

State

MA

Zip Code

01773

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,000

Name

ARMENIAN TREE PROJECT

Street

400 WEST CUMMINGS PARK, SUITE 3900

City

WOBURN

State

MA

Zip Code

01801

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

250

Name

AMERICAN FRIENDS OF GEORGIA, INC

Street

220 AARON RICH RD

City

WELLFLEET

State

MA

Zip Code

02667

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,250

Name

ALLENS NECK FRIENDS MEETING

Street

739 HORSENECK RD

City

SOUTH DARTMOUTH

State

MA

Zip Code

02748

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

750

BIRD CHARLES SUMNER FDN TR U/DECL

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Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

PLAN INTERNATIONAL USA

Street

155 PLAN WAY

City

WARWICK

State

RI

Zip Code

02886

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

UNITY SPIRITUAL CENTER IN THE ROCKIES

Street

1945 MESA RD

City

COLORADO SPRINGS

State

CO

Zip Code

80904

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

3,000

Name

TIBET MONGALOM

Street

13705 SW 84TH STREET UNIT D

City

MIAMI

State

FL

Zip Code

33183

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

MINERAL SPRINGS FOUNDATION C/O MANITOU SPRINGS CHAMBER OF COMMERCE

Street

1310 MANITOU AVE

City

MANITOU SPRINGS

State

CO

Zip Code

80829

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

500

Name

WEER AFRICA

Street

3274 WAKEFILED RD SUITE C

City

HARRISBURG

State

PA

Zip Code

17109

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

4,000

Name

EAGLEBROOK SCHOOL

Street

271 PINE NOOK RD

City

DEERFIELD

State

MA

Zip Code

01342

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

8,000

BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 5 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

NEWPORT PERFORMING ARTS CENTER RE NEWPORT OPERA HOUSE

Street

777 W OLIVE ST

City

NEWPORT

State

OR

Zip Code

97365

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

5,000

Name

OPEN GATE SANGHA

Street

P O BOX 112107

City

CAMPBELL

State

CA

Zip Code

95011-2107

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

12,000

Name

PATAGONIA YOUTH ENRICHMENT CENTER

Street

277 MCKEOWN AVE

City

PATAGONIA

State

AZ

Zip Code

85624

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

CENTER FOR SPIRITUAL LEARNING

Street

573 PARK POINT DRIVE

City

GOLDEN

State

CO

Zip Code

80401

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

3,000

Name

WELLFLEET HISTORICAL SOCIETY AND MUSEUM

Street

266 WEST MAIN STREET

City

WELLFLEET

State

MA

Zip Code

02667

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

SOUP KITCHEN IN PROVINCETOWN

Street

10 SHANK PAINTER ROAD

City

PROVINCETOWN

State

MA

Zip Code

02657

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,000

BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 6 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

C THOMAS CLAGETT JR MEMORIAL CLINIC AND REGATTA, INC

Street

231 INDIAN AVENUE

City

PORTSMOUTH

State

RI

Zip Code

02871

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

REDWOOD LIBRARY AND ATHENAEUM

Street

50 BELLEVUE AVENUE

City

NEWPORT

State

RI

Zip Code

02840

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

WHITE BISON

Street

6455 N UNION BLVD SUITE 102

City

COLORADO SPRINGS

State

CO

Zip Code

80918

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

1,000

Name

PIKES PEAK PERMACULTURE

Street

313 PLAINVIEW PLACE

City

MANITOU SPRINGS

State

CO

Zip Code

80829

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

500

Name

LAS CUMBRES COMMUNITY SERVICES

Street

102 NORTH CORONADO

City

ESPANOLA

State

NM

Zip Code

87532

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,500

Name

PATAGONIA REGIONAL

Street

2201 E CAMELBACK ROAD, SUITE 405B

City

PHOENIX

State

AZ

Zip Code

85016

Foreign Country**Relationship**

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

3,000

BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 7 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

THE SOLSTICE PROJECT AND ZVIA

Street

222 EAST MARCY STREET #10

City

SANTA FE

State

NM

Zip Code

87501

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

3,500

Name

EARTH ISLAND INSTITUTE

Street

2150 ALLSTON WAY SUITE 460

City

BERKELEY

State

CA

Zip Code

94704

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

2,000

Name

KRCC

Street

912 NORTH WEBER STREET

City

COLORADO SPRINGS

State

CO

Zip Code

80903

Foreign Country

Relationship

NONE

Foundation Status

PC

Purpose of grant/contribution

GENERAL OPERATING PURPOSES

Amount

500

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Name

Street

City

State

Zip Code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

Part I, Line 5 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

Long Term CG Distributions		Amount		Totals															Net Gain or Loss	
Short Term CG Distributions		107,232		Capital Gains/Losses															111,117	
		0		Other Sales															0	
Description	CUSIP #	Check "x" to include in Part IV	Purchaser	Check "x" if Purchaser is a Business	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss						
1 DREYFUS SELECT MGR S/C	86271F560	X				1/30/2015	7/30/2018	6,931	5,760				0	1,171						
2 DREYFUS SELECT MGR S/C	86271F560	X				3/20/2018	7/30/2018	50	48				2	2						
3 DREYFUS SELECT MGR S/C	86271F560	X				12/29/2017	7/30/2018	3,348	3,223				0	125						
4 DREYFUS SELECT MGR S/C	86271F560	X				3/25/2015	7/30/2018	8	7				0	1						
5 DREYFUS SELECT MGR S/C	86271F560	X				12/31/2014	7/30/2018	4,654	4,062				0	592						
6 DREYFUS SELECT MGR S/C	86271F560	X				3/19/2014	7/30/2018	9	9				0	0						
7 DREYFUS SELECT MGR S/C	86271F529	X				1/30/2015	7/30/2018	11,110	8,542				0	2,568						
8 DREYFUS SELECT MGR S/C	86271F529	X				12/20/2017	7/30/2018	4,448	3,979				0	469						
9 DREYFUS SELECT MGR S/C	86271F529	X				3/17/2017	7/30/2018	6,146	5,000				0	1,146						
10 DREYFUS SELECT MGR S/C	86271F529	X				12/18/2014	7/30/2018	3,296	2,597				0	699						
11 DREYFUS DIVERSIFIED INTL	261985228	X				3/17/2017	11/13/2017	10,000	8,692				0	1,308						
12 BNY MELLON BOND FUND-M	05569M830	X				8/10/2006	11/13/2017	5,623	5,384				0	239						
13 BNY MELLON BOND FUND-M	05569M830	X				12/8/2016	11/13/2017	768	761				0	7						
14 BNY MELLON BOND FUND-M	05569M830	X				10/21/2016	11/13/2017	1,723	1,772				0	-49						
15 BNY MELLON BOND FUND-M	05569M830	X				12/15/2014	11/13/2017	699	712				0	-13						
16 BNY MELLON BOND FUND-M	05569M830	X				3/19/2014	11/13/2017	9,875	10,000				0	-125						
17 BNY MELLON BOND FUND-M	05569M830	X				12/16/2013	11/13/2017	4,046	4,062				0	-16						
18 BNY MELLON BOND FUND-M	05569M830	X				1/31/1995	11/13/2017	2,266	2,171				0	95						
19 BNY MELLON M/C MULTI-STH	05569M509	X				12/20/2017	7/30/2018	10,000	9,402				0	598						
20 BNY MELLON LARGE CAP ST	05569M103	X				7/7/2010	7/30/2018	25,000	28,441				0	-3,441						
21 BNY MELLON LARGE CAP ST	05569M103	X				7/7/2010	11/13/2017	15,000	16,491				0	-1,491						

Part I, Line 18 (990-PF) - Taxes

		1,773	1,024	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	FOREIGN TAXES PAID	1,024	1,024		
2	ESITMATED EXCISE TAXES PAID	749			

Part I, Line 23 (990-PF) - Other Expenses

		35	0	0	35
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	STATE AG FEES	35	0		35

Part II, Line 13 (990-PF) - Investments - Other

1	Asset Description	Basis of Valuation	Book Value Beg of Year	Book Value End of Year	FMV End of Year
2	ADVANTAGE DYN TOTAL RET -Y		0	25,349	27,843
3	DREYFUS OPPORT SM CAP-Y		0	34,140	53,866
4	BNY MELLON LARGE CAP STK FD CL M		0	553,697	568,843
5	BNY MELLON INCOME STK FD CL M		0	68,211	117,624
6	BNY MELLON FOCUSED EQUITY OPP-M		0	66,957	116,245
7	BNY MELLON MID CAP STK FD CL M		0	189,274	307,599
8	BNY MELLON NATL S/T MUN BD FD CL M		0	58,185	56,934
9	BNY MELLON BOND FD CL M		0	263,445	268,117
10	BNY MELLON EMERGING MKTS FD CL M		0	40,653	57,645
11	DREYFUS FLOATING RATE INC-Y		0	65,000	62,864
12	DREYFUS PREM LT TRM HI YLD-R		0	50,056	48,393
13	DREYFUS DIVERSIFIED INTL-Y		0	205,735	283,783
14	DREYFUS GLOBAL REAL ES SEC-Y		0	32,920	38,834
15	DREYFUS INTL SMALL CAP-Y		0	59,514	73,705
16	DREYFUS DIVERSIFIED EM MK-Y		0	35,000	41,366
17	ASG MANAGED FUTURES STRAT-Y		0	20,691	21,198
18	DREYFUS SELECT MGR S/C GR-Y		0	28,587	50,563
19	DREYFUS US EQUITY FUND-Y		0	76,172	110,091
20	DREYFUS SELECT MGR S/C VL-Y		0	30,023	47,029

	3,885
Gains Minus	
Excess FMV Over	
Adj Basis or Losses	1,171
	<u>2</u>
	125
	<u>1</u>
	592
	<u>0</u>
	2,568
	469
	1,146
	699
	<u>1,308</u>
	239
	<u>7</u>
	-49
	-13
	-125
	-16
	95
	598
	<u>-3,441</u>
	-1,491

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account	
1	BNY Mellon, N A	X	P O BOX 185	Pittsburgh	PA	15230-0185		TRUSTEE	SEE ATTAQ	22,044	NONE	NONE	0

Part VI, Line 6a (990-PF) - Estimated Tax Payments

	Date		Amount
1 Credit from prior year return		1	147
2 First quarter estimated tax payment	1/21/2018	2	77
3 Second quarter estimated tax payment	2/10/2018	3	224
4 Third quarter estimated tax payment	6/7/2018	4	224
5 Fourth quarter estimated tax payment	9/10/2018	5	224
6 Other payments		6	
7 Total		7	896

Part XIII, Line 2a, Column C (990-PF) - Prior Year Undistributed Income

1	Distributable amounts for 2016 that remained undistributed at the beginning of the 2017 tax year	1	94,119
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10	Total	10	94,119

Attachment to Form 990PF Part VIII, Column (b) Title and Average Hours Per Week Devoted To Position

The compensation reported in column (b) paid to BNY Mellon, N.A. as Corporate Trustee is calculated based on market value and current fee schedule. It is not determined on an hourly basis. Corporate Trustee services include administrative responsibilities, grant requirements, recordkeeping, investment management, income collection, statement and accounting services, and regulatory reporting.