

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.
 ▶ Go to www.irs.gov/Form990PF for instructions and the latest information.




OMB No. 1545-0052
2019
Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019 , and ending 12-31-2019


Name of foundation The Greater Sum Inc		A Employer identification number 81-2326204	
Number and street (or P.O. box number if mail is not delivered to street address) 1467 Challen Ave	Room/suite	B Telephone number (see instructions) (904) 990-4589	
City or town, state or province, country, and ZIP or foreign postal code Jacksonville, FL 32205		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>443,628</u>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (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)	3,932			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	14,330			
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)			117,340	
	8 Net short-term capital gain				4,474
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)	0				
11 Other income (attach schedule)	0				
12 Total. Add lines 1 through 11	18,262	117,340	4,474		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	105,340			105,340
	14 Other employee salaries and wages	64,756			64,756
	15 Pension plans, employee benefits	18,756			18,756
	16a Legal fees (attach schedule)	7,052			7,052
	b Accounting fees (attach schedule)	0			
	c Other professional fees (attach schedule)	7,269			7,269
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	13,673			13,673
	19 Depreciation (attach schedule) and depletion	0			
	20 Occupancy				
	21 Travel, conferences, and meetings	29,021			29,021
	22 Printing and publications				
	23 Other expenses (attach schedule)	4,098			4,098
	24 Total operating and administrative expenses. Add lines 13 through 23	249,965		0	249,965
	25 Contributions, gifts, grants paid	100,000			100,000
26 Total expenses and disbursements. Add lines 24 and 25	349,965		0	349,965	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-331,703				
b Net investment income (if negative, enter -0-)		117,340			
c Adjusted net income (if negative, enter -0-)			4,474		

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	17,950	19,015	19,015
	2 Savings and temporary cash investments			
	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)		0	
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____		0	
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	0	0	2,400
	10a Investments—U.S. and state government obligations (attach schedule)	123,832 	130,139	130,139
	b Investments—corporate stock (attach schedule)	361,085 	203,880	223,370
	c Investments—corporate bonds (attach schedule)	250,375 	68,505	68,704
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____		0	
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)		0	
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____		0	
15 Other assets (describe ▶ _____)	0	0	0	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	753,242	421,539	443,628	
Liabilities	17 Accounts payable and accrued expenses		0	
	18 Grants payable		0	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons		0	
	21 Mortgages and other notes payable (attach schedule)		0	
	22 Other liabilities (describe ▶ _____)	0	0	
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds	753,242	421,539	
29 Total net assets or fund balances (see instructions)	753,242	421,539		
30 Total liabilities and net assets/fund balances (see instructions) .	753,242	421,539		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	753,242
2 Enter amount from Part I, line 27a	2	-331,703
3 Other increases not included in line 2 (itemize) ▶ _____ 	3	0
4 Add lines 1, 2, and 3	4	421,539
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 29 .	6	421,539

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.)
1a See Additional Data Table			
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 See Additional Data Table			
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 See Additional Data Table			
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		
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	{		2	117,340
	}		3	4,474

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))
2018	325,412	830,189	0.391973
2017	102,370		
2016			
2015			
2014			

2 Total of line 1, column (d)	2	0.391973
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	0.391973
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	590,697
5 Multiply line 4 by line 3	5	231,537
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,173
7 Add lines 5 and 6	7	232,710
8 Enter qualifying distributions from Part XII, line 4	8	349,965

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)

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, tax under section 511, subtitle A tax, and total tax due. Total tax due is 1,173.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaign participation, political expenditures, and state reporting. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, distributions, public inspection, and books in care.

Located at 1467 Challen Avenue Jacksonville FL ZIP+4 32205

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.

Table with 3 columns: Question, Yes, No. Row 16 regarding foreign country interest.

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.

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 Grantmaking Outreach See attachment - miscellaneous statement Form 990-PF, Part IX-A, Line 1 Statement 1	134,313
2 SME Volunteer Service to Nonprofits See attachment - miscellaneous statement Form 990-PF, Part IX-A, Line 1 Statement 2	29,109
3 Educational Materials & Events See attachment - miscellaneous statement Form 990-PF, Part IX-A, Line 1 Statement 3	30,015
4 Grant Funding See attachment - miscellaneous statement Form 990-PF, Part IX-A, Line 1 Statement 4	100,000

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	0
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 578,266
b	Average of monthly cash balances.	1b 21,426
c	Fair market value of all other assets (see instructions).	1c 0
d	Total (add lines 1a, b, and c).	1d 599,692
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
3	Subtract line 2 from line 1d.	3 599,692
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4 8,995
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 590,697
6	Minimum investment return. Enter 5% of line 5.	6 29,535

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here <input checked="" type="checkbox"/> and do not complete this part.)		
1	Minimum investment return from Part X, line 6.	1
2a	Tax on investment income for 2019 from Part VI, line 5.	2a
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b
c	Add lines 2a and 2b.	2c
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3
4	Recoveries of amounts treated as qualifying distributions.	4
5	Add lines 3 and 4.	5
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 0

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 349,965
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	4 349,965
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 1,173
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6 348,792

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				0
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2019:				
a From 2014.	0			
b From 2015.	0			
c From 2016.	0			
d From 2017.	102,370			
e From 2018.	325,557			
f Total of lines 3a through e.	427,927			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ _____ 349,965				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2019 distributable amount.				
e Remaining amount distributed out of corpus	349,965			
5 Excess distributions carryover applied to 2019. (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	777,892			
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		0		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	777,892			
10 Analysis of line 9:				
a Excess from 2015.	0			
b Excess from 2016.	0			
c Excess from 2017.	102,370			
d Excess from 2018.	325,557			
e Excess from 2019.	349,965			

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 2019, 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) 2019	(b) 2018	(c) 2017	(d) 2016	
2a	4,474		49,519	0	53,993
b 85% of line 2a	3,803		42,091	0	45,894
c Qualifying distributions from Part XII, line 4 for each year listed	349,965	325,557	102,370	9,270	787,162
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	349,965	325,557	102,370	9,270	787,162
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.			33,013	155	33,168
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 foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

Todd Silverstein

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

The Greater Sum Inc
1467 Challen Ave
Jacksonville, FL 32205
(904) 990-4589

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

Application and instructions are online at <https://thegreatersum.org/grant-application/>

c Any submission deadlines:

August 6th

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

Funding up to \$25,000 with limitations listed at <https://thegreatersum.org/grant-application/>

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	100,000
b <i>Approved for future payment</i> See Additional Data Table				
Total			▶ 3b	85,000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
Alphabet Inc Class A 100 shares	D	1999-12-09	2019-02-08
BLACKROCK, MPHQX	P	2019-02-08	2019-12-19
BLACKROCK, MPHQX	P	2017-08-28	2019-12-19
DFA, DCMSX	P	2019-02-08	2019-12-19
DFA, DCMSX	P	2017-08-28	2019-12-19
VANGUARD VBTLX	P	2019-02-11	2019-12-19
VANGUARD VTTLX	P	2017-02-28	2019-12-19
VANGUARD VT	P	2019-02-08	2019-06-18
VANGUARD VT	P	2017-08-28	2019-09-09

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
109,955	0	3	109,952
17,943	0	17,093	850
131,257	0	131,577	-320
9,015	0	9,075	-60
18,308	0	19,615	-1,307
17,243	0	16,439	804
133,607	0	132,559	1,048
82,320	0	79,440	2,880
42,868	0	39,375	3,493

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
0	0	0	109,952
0	0	0	850
0	0	0	-320
0	0	0	-60
0	0	0	-1,307
0	0	0	804
0	0	0	1,048
0	0	0	2,880
0	0	0	3,493

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
Todd Silverstein 321 Fulton Street Palo Alto, CA 94301	Chairman 1.00	0	0	0
Ellen Thomas 278 N Quaker Lane West Hartford, CT 06119	Director 1.00	0	0	0
Wade T Brooks 230 Richmond Ave SE Salem, OR 97301	Director 1.00	0	0	0
Anna Taylor 1467 Challen Avenue Jacksonville, FL 32205	Executive Director 40.00	105,340	9,488	0
Justin Chad Hunsaker 8809 Burbank Road Annandale, VA 22003	Director 1.00	0	0	0
Richard Mandel 218 Old Sudbury Road Sudbury, MA 01776	Director 1.00	0	0	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>				
Connecting Champions 6101 Penn Ave Pittsburgh, PA 15206		PC	Health	20,000
Global Minds 1129 Wightman Street Pittsburgh, PA 15217		PC	Education	20,000
Growing Change PO BOX 68 Laurinburg, NC 28353		PC	Environment	20,000
Total ▶ 3a				100,000

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>				
Union Capital Boston 1542 Columbus Avenue Roxbury, MA 02119		PC	Community Building	20,000
Vioneers World Access for the Blind 650 North Rose Drive Unit 208 Placentia, CA 92870		PC	Community Building	20,000
Total ▶ 3a				100,000

TY 2019 Investments Corporate Bonds Schedule**Name:** The Greater Sum Inc**EIN:** 81-2326204**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Blackrock Total Return Bond Fund - CS 7184	34,437	34,564
Vanguard Bond Index fund Total - CS 7184	34,068	34,140

TY 2019 Investments Corporate Stock Schedule**Name:** The Greater Sum Inc**EIN:** 81-2326204**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Vanguard Total World Stock Index ETF - CS 7184	203,880	223,370
DFA Commodity Strategy Fund - CS 7184	0	0
Alphabet Inc Class A- CS 7164	0	0

TY 2019 Investments Government Obligations Schedule**Name:** The Greater Sum Inc**EIN:** 81-2326204**US Government Securities - End
of Year Book Value:**

130,139

**US Government Securities - End
of Year Fair Market Value:**

130,139

**State & Local Government
Securities - End of Year Book
Value:****State & Local Government
Securities - End of Year Fair
Market Value:**

TY 2019 Other Expenses Schedule**Name:** The Greater Sum Inc**EIN:** 81-2326204**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Payroll service related fees	786			786
Postage	57			57
Insurance and subscriptions	2,648			2,648
Equipment	607			607

TY 2019 Other Income Schedule**Name:** The Greater Sum Inc**EIN:** 81-2326204**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
misc	0		

TY 2019 Other Increases Schedule**Name:** The Greater Sum Inc**EIN:** 81-2326204

Description	Amount
rounding	0

TY 2019 Taxes Schedule**Name:** The Greater Sum Inc**EIN:** 81-2326204

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Payroll taxes	13,673			13,673
Excise tax and penalty	0			

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1. Grantmaking Outreach

The Foundation identifies innovative early-stage organizations who are in need of both funding and strategic support in order to expand the impact of their promising work in the Foundation's focus areas of education, environment, community-building, and health. 2019 activities included: call for applications, website, Q&A webinar, video pitch and volunteer review of applications. 2019 expenses included: social media advertising, Nuka conference ad, printing, Exponent Philanthropy Conference and PEAK grantmaking conference registration & lodging.

2. SME Volunteer Service to Nonprofits

The Foundation matches skills-based volunteers with nonprofits for short and long term collaboration with a goal of increasing the capacity of the nonprofits to achieve their mission. SME skill sets include HR, IT, data analysis, business strategy, nonprofit management, and fundraising. 2019 activities included: volunteer recruitment, oversight, and support 2019 expensed included the Bloomerang subscription.

3. Educational Materials & Events

The Foundation ensures that volunteers have the knowledge and skills needed to assist their nonprofit partners in navigating sector challenges, and that members of our nonprofit community beyond those funded by the Foundation benefit from SME experience & nonprofit best practices. 2019 activities included: videos, e-newsletters, social media and the Greater Summit. 2019 expenses included Chronicle of Philanthropy subscription, IS membership, Association of Fundraising Professionals conference, Women in Nonprofit Leadership Conference, and Upswell Conference, plus summit costs (venue, presenter, travel, food, lodging).

4. Grant Funding

Five organizations were granted funding and support:

- 1) *CCChampions –(\$20,000) provides long term social support to bridge the developmental gap between kids with cancer and their peers. The Greater Sum funding and support to be used to assist in their expansion to Cleveland, building a sustainable, replicable model and stepping onto the national stage.*
- 2) *Global Minds- (\$20,000) youth organization that inspires students to form social bonds, intercultural friendships, and to consider global issues through youth-led extracurricular activities. Greater Sum funds to be used to assist their newly-hired Program Director in tracking outcomes, building capacity and growing the program.*
- 3) *Growing Change-(\$20,000) vision is to transform closed prisons into sustainable farms, thereby creating opportunities for troubled youth, returning veterans, and the community at large. Greater Sum funding to be used to add a biochar project to their current retail and agritourism revenue streams.*
- 4) *Union Capital Boton- (\$20,000) Encourages volunteerism and civic engagement in order to build a more resilient and successful community networks. Greater Sum funds to be used to develop a comprehensive report on program impacts and plans for sustainable growth.*
- 5) *Visioneers: World Access for the Blind- (\$20,000) teaches blind people to see with sound and promotes integration of blind persons into community by increasing public awareness about the strengths and capabilities of blind people. They will use Greater Sum funding to develop an international training and credentialing program for instructors.*