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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.
▶ 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 09-01-2019 , and ending 08-31-2020

Name of foundation
BUNDY FOUNDATION

A Employer identification number
94-6659802

Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 52007 | Room/suite

B Telephone number (see instructions)
(949) 553-7177

City or town, state or province, country, and ZIP or foreign postal code
PHOENIX, AZ 85072

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here............ ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

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

E If private foundation status was terminated under section 507(b)(1)(A), check here .... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16*) ▶$ 9,234,749

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

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .... ▶ ☐

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	238,356	238,356		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	150,655			
	b	Gross sales price for all assets on line 6a 1,187,459				
	7	Capital gain net income (from Part IV, line 2)		150,655		
	8	Net short-term capital gain			0	
	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)	1,994			
	12	**Total.** Add lines 1 through 11	391,005	389,011		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	131,413	98,560		32,853
	14	Other employee salaries and wages		0	0	0
	15	Pension plans, employee benefits		0	0	
	16a	Legal fees (attach schedule)				0
	b	Accounting fees (attach schedule)	1,250	0	0	1,250
	c	Other professional fees (attach schedule)				0
	17	Interest				0
	18	Taxes (attach schedule) (see instructions)	3,870	3,870		0
	19	Depreciation (attach schedule) and depletion	0	0		
	20	Occupancy				
	21	Travel, conferences, and meetings		0	0	
	22	Printing and publications		0	0	
	23	Other expenses (attach schedule)	131	71		60
	24	**Total operating and administrative expenses.** Add lines 13 through 23	136,664	102,501	0	34,163
	25	Contributions, gifts, grants paid	405,062			405,062
	26	**Total expenses and disbursements.** Add lines 24 and 25	541,726	102,501	0	439,225
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-150,721			
	b	**Net investment income** (if negative, enter -0-)		286,510		
	c	**Adjusted net income** (if negative, enter -0-)			0	

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

			Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	54,304	212,150	212,150
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶		0	0
	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 ▶ 0			
	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)	2,771,293	2,747,210	4,501,335
	c	Investments—corporate bonds (attach schedule)	959,035	732,522	642,078
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	3,563,705	3,504,626	3,879,186
	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)	7,348,337	7,196,508	9,234,749
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	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶ ☐ 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 ▶ ☑ and complete lines 26 through 30.			
	26	Capital stock, trust principal, or current funds	7,348,337	7,196,508	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	7,348,337	7,196,508	
	30	**Total liabilities and net assets/fund balances** (see instructions)	7,348,337	7,196,508	

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	7,348,337
2	Enter amount from Part I, line 27a	2	-150,721
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	7,197,616
5	Decreases not included in line 2 (itemize) ▶	5	1,108
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	7,196,508

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 }	2	150,655
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))
2018	461,983	8,879,012	0.052031
2017	449,452	9,321,176	0.048218
2016	427,934	8,963,007	0.047744
2015	471,437	8,614,117	0.054728
2014	426,230	9,171,131	0.046475

2	**Total** of line 1, column (d)	2	0.249196
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	0.049839
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	8,850,297
5	Multiply line 4 by line 3	5	441,090
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,865
7	Add lines 5 and 6	7	443,955
8	Enter qualifying distributions from Part XII, line 4	8	439,225

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	5,730
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	5,730
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	5,730
6	Credits/Payments:				
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	1,304		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	0		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments. Add lines 6a through 6d			7	1,304
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	4,426
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 0 **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)	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(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.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities (continued)

				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.		11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		13	Yes	

Website address ▶

14 The books are in care of ▶MUFG UNION BANK NA Telephone no. ▶(949) 553-7177

Located at ▶PO BOX 45174 SAN FRANCISCO CA ZIP+4 ▶94101

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here . . . ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year . . . ▶ 15

			Yes	No
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?.	☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☑ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?.	☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.).	☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions		1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?.		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 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019?.	☐ 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 2019 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 2019.)*.		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 2019?		4b		No

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

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No *If "Yes," attach the statement required by Regulations section 53.4945–5(d).*			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? *If "Yes" to 6b, file Form 8870.*	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		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year? ☐ Yes ☑ No			

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
MUFG UNION BANK N A PO BOX 45174 SAN FRANCISCO, CA 941450174	CO-TRUSTEE 20	95,499		
DOUGLAS NOSEWORTHY 6239 E 5TH STREET LONG BEACH, CA 90803	CO-TRUSTEE 20	35,914		

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

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

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

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

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

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

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	8,698,778
b	Average of monthly cash balances.	1b	286,295
c	Fair market value of all other assets (see instructions).	1c	0
d	**Total** (add lines 1a, b, and c).	1d	8,985,073
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	8,985,073
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	134,776
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,850,297
6	**Minimum investment return.** Enter 5% of line 5.	6	442,515

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	442,515
2a	Tax on investment income for 2019 from Part VI, line 5. 2a 5,730		
b	Income tax for 2019. (This does not include the tax from Part VI.). 2b		
c	Add lines 2a and 2b.	2c	5,730
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	436,785
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	436,785
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	436,785

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	439,225
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	439,225
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	439,225

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				436,785
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			405,062	
b Total for prior years: 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014. 0				
b From 2015. 0				
c From 2016. 0				
d From 2017. 0				
e From 2018. 0				
f **Total** of lines 3a through e.	0			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 439,225				
a Applied to 2018, but not more than line 2a			405,062	
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 2019 distributable amount.				34,163
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2019. *(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 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				402,622
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 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	0			
10 Analysis of line 9:				
a Excess from 2015. . . . 0				
b Excess from 2016. . . . 0				
c Excess from 2017. . . . 0				
d Excess from 2018. . . . 0				
e Excess from 2019. . . . 0				

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)

	Tax year	Prior 3 years			(e) Total
	(a) 2019	**(b)** 2018	**(c)** 2017	**(d)** 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter: **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV **Supplementary Information (Complete this part only if the 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).)

NONE

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 email address of the person to whom applications should be addressed:

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				405,062
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	238,356	
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.					
8 Gain or (loss) from sales of assets other than inventory			18	150,655	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a FEDERAL TAX REFUND			1	1,994	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e). .				391,005	

13 **Total.** Add line 12, columns (b), (d), and (e). 13 391,005

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (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.

******	2020-12-01	******
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
BRADLEY N SPRONG		2020-12-01		P00642561
Firm's name ▶ KPMG LLP				Firm's EIN ▶13-5565207
Firm's address ▶ 2020 N CENTRAL AVE STE 700 PHOENIX, AZ 85004				Phone no. (800) 810-2207

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

(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.)
100000. JPMORGAN CHASE & CO 2.200% 10/22/19		2015-01-05	2019-10-22
100000. BB&T CORP BDS 2.450% 1/15/20		2015-01-05	2019-12-16
350. ABBOTT LABS COM		2019-05-28	2020-02-03
400. ANALOG DEVICES INC		2012-12-06	2020-02-03
200. BAXTER INTL INC COM		2015-02-24	2020-02-03
723.763 DODGE & COX INTL STOCK FD(CLSD)#1048		2006-12-15	2020-02-03
5418. ISHARES GOLD TR		2016-12-15	2020-02-03
200. NOVARTIS AG SPNSRD ADR		2013-10-07	2020-02-03
200. PHILLIPS 66 COM		2016-08-30	2020-02-03
2205. VANGUARD FTSE DEVELOPED MARKETS ETF		2019-05-28	2020-02-03

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)
100,000		99,417	583
100,000		100,005	-5
30,696		26,812	3,884
44,170		15,367	28,803
18,069		7,442	10,627
30,145		33,657	-3,512
81,350		59,249	22,101
18,916		13,255	5,661
17,973		15,901	2,072
94,780		89,247	5,533

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	
			583
			-5
			3,884
			28,803
			10,627
			-3,512
			22,101
			5,661
			2,072
			5,533

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

(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.)
200. GILEAD SCIENCES INC		2018-01-02	2020-02-05
100. ALLERGAN PLC SHS		2014-12-26	2020-05-11
.6 ABBVIE INC COM		2020-05-11	2020-05-18
400. CARNIVAL CRUISE LINES INC		2016-08-30	2020-07-24
530. E TRADE FIN CORP COM		2020-02-03	2020-07-24
25. REGENERON PHARMACEUTICALS INC		2020-02-03	2020-07-24
50. APPLE INC COM		2011-12-29	2020-08-06
169. ISHARES S&P MID-CAP 400 GROWTH ETF		2003-12-15	2020-08-06
1225.551 MFS INTERNATIONAL GROWTH R6 # 4805		2008-06-20	2020-08-06
42. AQR EQTY MKT NEUTRAL FD R6 #15296		2016-12-16	2020-08-19

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)
13,222		14,821	-1,599
19,302		25,707	-6,405
51		50	1
5,911		18,954	-13,043
27,515		22,887	4,628
15,294		8,586	6,708
22,557		2,893	19,664
41,300		9,800	31,500
46,657		29,366	17,291
334		507	-173

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	
			-1,599
			-6,405
			1
			-13,043
			4,628
			6,708
			19,664
			31,500
			17,291
			-173

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

(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.)
15569.559 BLACKSTONE ALTNV MLT STR FD CL I		2016-12-16	2020-08-19
300. HALLIBURTON CO		2014-02-13	2020-08-19
42. MFS INTERNATIONAL GROWTH R6 # 4805		2008-06-20	2020-08-19
50. WELLS FARGO & CO COM		2008-06-23	2020-08-19
16040.329 WESTERN ASSET MAC OPP IS FD #5102		2016-08-30	2020-08-19
5899.646 ARBITRAGE FD CL I #1000		2014-02-13	2020-08-20
86. ABBVIE INC COM		2020-05-11	2020-08-25
13. ISHARES S&P MID-CAP 400 GROWTH ETF		2003-12-15	2020-08-25
17. ISHARES S&P-MD CAP 400 VAL ETF		2003-12-15	2020-08-25
62. VANGUARD SMALL-CAP VALUE ETF		2016-08-30	2020-08-25

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)
156,007		158,342	-2,335
4,973		15,889	-10,916
1,624		1,006	618
1,202		1,202	
180,293		175,000	5,293
80,530		75,692	4,838
8,112		7,186	926
3,185		754	2,431
2,412		905	1,507
7,152		6,905	247

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	
			-2,335
			-10,916
			618
			5,293
			4,838
			926
			2,431
			1,507
			247

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

(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.)
CAPITAL GAIN DIVIDENDS	P		

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)
			13,727

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	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
THE SALK INSTITUTE FOR BIOLOGICAL STUDIES 10010 NORTH PINES RD LA JOLLA, CA 92037	NONE	EXEMPT	CHARITABLE	100,000
BRAILLE INSTITUTE ATTN RICHARD PATTERSON 741 N VERMONT AVENUE LOS ANGELES, CA 900293514	NONE	EXEMPT	CHARITABLE	13,000
JOHN TRACY CLINIC 806 WEST ADAMS BOULEVARD LOS ANGELES, CA 90007	NONE	EXEMPT	CHARITABLE	18,000
Total . . . . ▶ **3a**				405,062

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
JULES STEIN EYE INSTITUTE 100 STEIN OKAZA - UCLA LOS ANGELES, CA 900957000	NONE	EXEMPT	CHARITABLE	100,000
GOODWILL INDUSTRIES OF ORANGE COUNTY410 NORTH FAIRVIEW SANTA ANA, CA 92703	NONE	EXEMPT	CHARITABLE	10,000
EASTER SEALS SOUTHERN CALIFORNIA INC1570 EAST 17TH ST SANTA ANA, CA 92705	NONE	EXEMPT	CHARITABLE	13,000
Total . . . . ▶ **3a**				405,062

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
BLIND CHILDRENS LEARNING CENTER 18542-B VANDERLIP AVE SANTA ANA, CA 92705	NONE	EXEMPT	CHARITABLE	33,000
ALZHEIMERS ASSOC OF ORANGE COUNTY 600 ANTON BLVD COSTA MESA, CA 92626	NONE	EXEMPT	CHARITABLE	13,000
SANFORD BURNHAM PREBYS MED DISCOVERY INSTITUTE 10901 NORTH TORREY PINES ROAD La Jolla, CA 92037	NONE	EXEMPT	CHARITABLE	100,000
Total . . . . ▶ **3a**				405,062

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
WAYFINDER FAMI SVCS (FKA JUNIOR BLIND OF AMERICA) 5300 ANGELES VISTA BOULEVARD LOS ANGELES, CA 90043	NONE	EXEMPT	CHARITABLE	5,062
Total . . . . ▶ **3a**				405,062

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TY 2019 Accounting Fees Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	1,250			1,250

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TY 2019 Investments Corporate Bonds Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ESC TRIBUNE CO	137,401	
BB&T CORP BDS 2.450% 1/15/20		
BHP BILLITON FIN USA 2.875% 2/	100,748	103,577
CHEVRON CORP NTS 2.411% 3/3/22	100,079	102,909
JPMORGAN CHASE & CO 2.2% 10/22		
3M CO BDS 2.875% 10/15/27	99,886	112,460
MONDELEZ INTL BDS 4.000% 2/01/	104,341	111,136
NIKE INC NT 2.375% 11/01/26	89,927	108,933
SUNTRUST BANKS NT 2.700% 1/27/	100,140	103,063

TY 2019 Investments Corporate Stock Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMERICAN TOWER CORP	29,977	124,575
ANALOG DEVICES INC	14,884	52,596
APPLE INC COM	37,602	335,504
BLACKROCK INC	38,700	118,838
CHEVRON CORP, COMMON STOCK	10,690	41,965
COCA-COLA CO	30,012	49,530
ECOLAB INC	28,893	98,540
HALLIBURTON CO		
JPMORGAN CHASE & CO	15,299	88,768
LOCKHEED MARTIN CORP	24,902	78,052
MCDONALDS CORP	43,840	106,760
MERCK & CO COM COM	28,704	68,216
MICROSOFT CORP	26,840	225,530
NOVARTIS AG SPNSRD SDR	6,627	8,606
PAYCHEX INC	18,518	38,235
PFIZER INC	8,752	60,464
PHILIP MORRIS INTL COM	27,177	31,916
PROCTER & GAMBLE CO	54,154	110,664
QUALCOMM INC	31,168	71,460
ROYAL DUTCH SHELL PLC-ADR A	22,007	8,904
SCHLUMBERGER LTD	11,998	3,802
SCHWAB CHARLES CORP NEW	25,495	35,530
TARGET CORP	11,836	30,242
UNITED PARCEL SERVICE CL B	36,750	81,810
UNITED TECHNOLOGIES CORP		
VERIZON COMMUNICATIONS	16,701	42,556
WELLS FARGO & CO COM	13,217	13,283
WEYERHAEUSER CO COM	10,846	18,186
ALLERGAN PLC SHS		
BAXTER INTL INC		

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CITIGROUP INC	43,230	36,295
COMCAST CORP CL A	39,541	58,253
GILEAD SCIENCES INC		
GOLDMAN SACHS	11,305	10,244
MEDTRONIC PLC SHS	21,116	30,736
MONDELEZ INTL INC CL A	39,728	58,420
WEC ENERGY GRP	18,893	75,264
CARNIVAL CRUISE LINES		
CHUBB LIMITED COM	25,388	25,000
EDISON INTL	35,041	26,240
FORTIVE CORP COM	2,331	7,211
LOWES COS INC	31,902	65,876
PHILLIPS 66 COM	15,901	11,694
ROCHE HLDG LTD	15,523	21,850
SUNCOR ENERGY INC	13,975	8,015
TJX COS INC NEW	33,835	54,790
ALPHABET INC CAP STK CL A	81,587	162,953
BRISTOL MYERS SQUIBB CO	33,901	35,765
CISCO SYS INC	30,641	42,220
FACEBOOK INC CL A	24,042	58,640
UNITEDHEALTH GROUP INC	32,184	62,510
XILINX INC	30,072	52,080
ANHEUSER BUSCH INBEV SA/NV SPO	42,523	23,260
INVESCO LTD COM	26,766	7,650
LILY ELI & CO	35,724	48,227
NOVO-NORDISK A S SPNSRD ADR	23,536	33,020
ORACLE CORP	49,733	58,364
PARKER HANNIFIN CORP	16,619	20,601
VANGUARD SMALL-CAP ETF	420,294	439,727
ABBOTT LABS COM	22,982	32,841

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALCON INC ORD SHS	28,838	28,670
AMAZON.COM INC	46,108	86,274
BERKSHIRE HATHAWAY B	54,353	54,510
DISNEY COMPANY HOLDING CO	46,795	46,155
VANGUARD FTSE DEVELOPED MARKET	560,376	579,690
CARRIER GLOBAL CORP	1,792	2,985
CORNING INC	29,801	35,641
CORTEVA INC	24,972	23,839
NORTONLIFELOCK INC COM	30,123	41,748
OTIS WORLDWIDE CORP	2,688	3,145
PNC FINANCIAL SERVICES GROUP	45,725	33,805
RAYTHEON TECHNOLOGIES CORP COM	5,980	6,100
REGENERON PHARMACEUTICALS INC	25,757	46,495

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TY 2019 Investments - Other Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AQR MGD FUTURES STRATEGY	AT COST	158,073	132,510
ARBITRAGE FD CL	AT COST	43,011	45,726
DODGE & COX INTL STOCK	AT COST	322,666	261,934
EATON VANCE FLTG RT & HI	AT COST	227,682	218,593
EATON VANCE GLBL MACR ABSOL RE	AT COST	185,573	179,261
ISHARES S&P MID-CAP 400 GROWTH	AT COST	46,681	197,732
ISHARES S&P-MD CAP 400 VAL ETF	AT COST	74,035	197,144
MFS INTL GROWTH R6 #4805	AT COST	170,117	276,954
PAYDEN LOW DURATION FD	AT COST	196,592	202,720
PIMCO TOTAL RETURN INSTL	AT COST	206,219	219,796
VNGRD ST TERM INVMT GRADE ADM	AT COST	259,248	274,808
ISHARES CORE US AGGREGATE BD E	AT COST	30,923	32,907
VANGUARD SMALL CAP GR VIPERS	AT COST	59,896	99,213
VANGUARD SMALL CAP VALUE ETF	AT COST	92,990	96,484
WESTERN ASSET MAC OPP IS FD			
AQR EQTY MKT NEUTRAL FD R6 #15	AT COST	69,946	45,586
AQR STYLE PREMIA ALT CL R6 #15	AT COST	79,171	52,097
BLACKROCK STRAT INC OPPS CL K	AT COST	89,653	91,610
BLACKSTONE ALTNV MLT STR FD CL			
ISHARES GOLD TR			
ISHARES TIPS BD ETF	AT COST	78,935	89,902
PRUDENTIAL TOTAL RTRN BD CL Q	AT COST	196,877	210,425
DOUBLELINE CORE FIXED INC CL I	AT COST	279,899	292,455
HARTFORD SCHRODERS EMRG MKT FD	AT COST	197,279	230,957
NATIXIS ASG MGD FUT CL N #6100	AT COST	151,564	155,219
VANGUARD REAL ESTATE ETF	AT COST	104,558	91,969
VANGUARD ULT-S/T ADMIRAL FD #5	AT COST	91,519	91,474
BLACKROCK EV DRIVEN EQTY FD #0	AT COST	91,519	91,710

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TY 2019 Other Decreases Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Description	Amount
INCOME TIMING DIFFERENCE	1,108

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TY 2019 Other Expenses Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CA FILING FEE	10	0		10
CA FORM RRF-1 FILING FEE	50	0		50
OTHER NON-ALLOCABLE EXPENSES	71	71		0

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TY 2019 Other Income Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FEDERAL TAX REFUND	1,994	0	

TY 2019 Section 4942(a)(2) Explanation Statement

Name: BUNDY FOUNDATION

EIN: 94-6659802

Explanation: THIS QUESTION DOES NOT APPLY. THE FOUNDATION DOES NOT HAVE ANY UNDISTRIBUTED INCOME FROM PRIOR YEARS.

TY 2019 Taxes Schedule

Name: BUNDY FOUNDATION

EIN: 94-6659802

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	464	464		0
FOREIGN TAXES ON QUALIFIED FOR	2,668	2,668		0
FOREIGN TAXES ON NONQUALIFIED	738	738		0