

Return of Private Foundation

Department of the Treasury Internal Revenue Service

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1712

2017

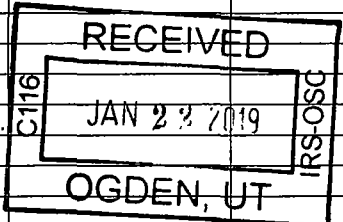
Open to Public Inspection

For calendar year 2017 or tax year beginning , 2017, and ending , 20

Name of foundation: SUGAR FAMILY FOUNDATION RONA. A Employer identification number: 47-3980241. B Telephone number: 609-274-6834. G Check all that apply: Initial return, Final return, Address change, Name change. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$ 2,564,216. J Accounting method: Cash.

34

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-27).



SCANNED MAR 21 2018

Revenue Operating and Administrative Expenses

1.9 630

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	19,002.	2.	2.
	2	Savings and temporary cash investments	25,147.	59,530.	59,530.
	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 ▶			NONE
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U S and state government obligations (attach schedule)	44,988.		
	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) STMT 7.	1,355,133.	2,305,599.	2,504,684.
	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)	1,444,270.	2,365,131.	2,564,216.	
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)			NONE	
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	1,444,270.	2,365,131.	
	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)	1,444,270.	2,365,131.		
31	Total liabilities and net assets/fund balances (see instructions)	1,444,270.	2,365,131.		

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 1,444,270.
2	Enter amount from Part I, line 27a	2 934,315.
3	Other increases not included in line 2 (itemize) ▶	3
4	Add lines 1, 2, and 3	4 2,378,585.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5 13,454.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6 2,365,131.

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.)
1 a PUBLICLY TRADED SECURITIES						
b						
c						
d						
e						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)			
a 2,276,216.		1,283,540.	992,676.			
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any				
a				992,676.		
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	992,676.	
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 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	957,599.	1,482,314.	0.646016
2015	286,412.	326,884.	0.876188
2014			
2013			
2012			
2 Total of line 1, column (d)			2 1.522204
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 0.761102
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 1,738,400.
5 Multiply line 4 by line 3.			5 1,323,100.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 10,287.
7 Add lines 5 and 6.			7 1,333,387.
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			8 653,118.

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	1	20,574.
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	NONE
3	Add lines 1 and 2	3	20,574.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	NONE
5	Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-	5	20,574.
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	17,444.
b	Exempt foreign organizations - tax withheld at source	6b	NONE
c	Tax paid with application for extension of time to file (Form 8868)	6c	3,130.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d	7	20,574.
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax <input type="checkbox"/> NONE Refunded <input checked="" type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
b		X
c		X
d		
e		
2		X
3		X
4a		X
4b		
5		X
6	X	
7	X	
8a		
b	X	
9		X
10		X

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 ▶ <u>N/A</u>	X	
14 The books are in care of ▶ <u>US TRUST FIDUCIARY TAX SERVICES</u> Telephone no ▶ <u>(609) 274-6834</u> Located at ▶ <u>1300 MERRILL LYNCH DRIVE, PENNINGTON, NJ</u> ZIP+4 ▶ <u>08534</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <u>15</u>		
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?		X
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

	Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies		
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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 type="checkbox"/> Yes <input checked="" 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"/>		
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?		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 ▶ _____		
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)		X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ _____		
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)		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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		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	
<i>All other program-related investments See instructions</i>	
3 NONE	
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	1,643,096.
b	Average of monthly cash balances	1b	121,777.
c	Fair market value of all other assets (see instructions).	1c	NONE
d	Total (add lines 1a, b, and c)	1d	1,764,873.
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	NONE
3	Subtract line 2 from line 1d	3	1,764,873.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	26,473.
5	Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,738,400.
6	Minimum investment return Enter 5% of line 5	6	86,920.

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	86,920.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	20,574.
b	Income tax for 2017. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	20,574.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	66,346
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	66,346.
6	Deduction from distributable amount (see instructions).	6	NONE
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	66,346

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	653,118.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	653,118.
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	N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	653,118.

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				66,346.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			NONE	
b Total for prior years 20____, 20____, 20____		NONE		
3 Excess distributions carryover, if any, to 2017				
a From 2012	NONE			
b From 2013	NONE			
c From 2014	NONE			
d From 2015	276,654.			
e From 2016	900,927.			
f Total of lines 3a through e	1,177,581.			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 653,118.				
a Applied to 2016, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2017 distributable amount				66,346.
e Remaining amount distributed out of corpus.	586,772.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,764,353.			
b Prior years' undistributed income Subtract line 4b from line 2b.		NONE		
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		NONE		
d Subtract line 6c from line 6b Taxable amount - see instructions		NONE		
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount - see instructions			NONE	
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018.				NONE
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)	NONE			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	1,764,353.			
10 Analysis of line 9				
a Excess from 2013	NONE			
b Excess from 2014	NONE			
c Excess from 2015	276,654.			
d Excess from 2016	900,927.			
e Excess from 2017	586,772.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
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))

N/A

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

N/A

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				
ALLIANCE COLLEGE READY PUBLIC SCHOOLS 601 SOUTH FIGUEROA ST, 4TH FL LOS ANGELES CA	N/A	PC	UNRESTRICTED GENERAL SUPPORT	30,000.
GRAMEEN AMERICA INC 150 WEST 30TH ST, 8TH FL NEW YORK NY 10001-4	N/A	PC	UNRESTRICTED GENERAL SUPPORT	1,000.
NATIONAL ACADEMY OF ENGINEERING FUND 2101 CONSTITUTION AVE NW WASHINGTON DC 20418	N/A	PC	UNRESTRICTED GENERAL SUPPORT	1,000.
CONNECTING CULTURES MOBILE MUSEUM 2558 AIKEN AVE LOS ANGELES CA 90064-3306	N/A	PC	UNRESTRICTED GENERAL SUPPORT	500.
ACHIEVEMENT REWARDS FOR COLLEGE SCIENTISTS FD PO BOX 8394 RANCHO SANTA FE CA 92067-8394	N/A	PC	UNRESTRICTED GENERAL SUPPORT	10,000.
COMMUNITY FOUNDATION OF THE LOW COUNTRY 4 NORTHBRIDGE DR, STE A HILTON HEAD SC 29926	N/A	PC	UNRESTRICTED GENERAL SUPPORT	1,000.
UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY PARK LOS ANGELES CA 90089-0001	N/A	PC	UNRESTRICTED GENERAL SUPPORT	80,000.
LOS ANGELES PHILHARMONIC ASSOCIATION 151 S GRAND AVE LOS ANGELES CA 90012-3034	N/A	PC	UNRESTRICTED GENERAL SUPPORT	170,000.
THE UCLA FOUNDATION 10920 WILSHIRE BLVD, STE 900 LOS ANGELES CA	N/A	PC	UNRESTRICTED GENERAL SUPPORT	350,000.
Total ▶ 3a				643,500.
b Approved for future payment				
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include Program service revenue, Membership dues, Interest on savings, Dividends, Net rental income, Gain or loss from sales, and Subtotal.

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

Table with 2 columns: 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.

NOT APPLICABLE

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

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (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
(2) Other assets
b Other transactions
(1) Sales of assets to a noncharitable exempt organization
(2) Purchases of assets from a noncharitable exempt organization
(3) Rental of facilities, equipment, or other assets
(4) Reimbursement arrangements
(5) Loans or loan guarantees
(6) Performance of services or membership or fundraising solicitations
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees
d If the answer to any of the above is "Yes," complete the following schedule

Table with 4 columns: (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

Table with 3 columns: (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.
Signature of officer or trustee: [Signature] Date: 10-5-18 Title: Trustee

May the IRS discuss this return with the preparer shown below? See instructions [X] Yes [] No

Paid Preparer Use Only Print/Type preparer's name: KAREN J KISER, Preparer's signature: [Signature], Date: 09/07/2018, Firm's name: BANK OF AMERICA, Firm's address: P O BOX 1802 PROVIDENCE, RI 02901-1802, Firm's EIN: 94-1687665, Phone no: 888-866-3275

Schedule of Contributors

2017

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF
 ▶ Go to www.irs.gov/Form990 for the latest information

Name of the organization SUGAR FAMILY FOUNDATION	Employer identification number 47-3980241
--	---

Organization type (check one)

- | Filers of | Section |
|--------------------|--|
| Form 990 or 990-EZ | <input type="checkbox"/> 501(c)() (enter number) organization
<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
<input type="checkbox"/> 527 political organization |
| Form 990-PF | <input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
<input type="checkbox"/> 501(c)(3) taxable private foundation |

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization **SUGAR FAMILY FOUNDATION** Employer identification number **47-3980241**

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed

(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 500,085.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 498,879.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
3	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 44,231.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
4	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 10,816.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
5	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 62,049.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
6	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 56,411.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization SUGAR FAMILY FOUNDATION	Employer identification number 47-3980241
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Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>28,813.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
8	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>63,396.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
9	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>40,253.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
10	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>34,247.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
11	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>52,955.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
12	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>37,024.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization SUGAR FAMILY FOUNDATION	Employer identification number 47-3980241
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Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 42,211.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
14	RONALD AND VALERIE SUGAR 228 COPA DE ORO RD LOS ANGELES, CA 90077-3804	\$ 41,412.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization SUGAR FAMILY FOUNDATION	Employer identification number 47-3980241
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Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>1</u>	<u>1,619 SHS NORTHROP GRUMMAN CORP</u> _____ _____	\$ <u>500,085.</u>	<u>12/18/2017</u>
<u>2</u>	<u>1670 SHS NORTHROP GRUMMAN CORP</u> _____ _____	\$ <u>498,879.</u>	<u>11/10/2017</u>
<u>3</u>	<u>527 SHS MICROSOFT CORP COM</u> _____ _____	\$ <u>44,231.</u>	<u>11/30/2017</u>
<u>4</u>	<u>116 SHS HASBRO INC COM</u> _____ _____	\$ <u>10,816.</u>	<u>11/30/2017</u>
<u>5</u>	<u>451 SHS NORFOLK SOUTHERN CORP COM</u> _____ _____	\$ <u>62,049.</u>	<u>11/30/2017</u>
<u>6</u>	<u>866 SHS CARNIVAL CORP PAIRED CTF</u> _____ _____	\$ <u>56,411.</u>	<u>11/30/2017</u>

Name of organization SUGAR FAMILY FOUNDATION	Employer identification number 47-3980241
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Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
7	150 SHS BERKSHIRE HATHAWAY CO DEL _____ _____ _____	\$ 28,813.	11/30/2017
8	308 SHS GENERAL DYNAMICS CORP COM _____ _____ _____	\$ 63,396.	11/30/2017
9	538 SHS CINNCINATI FINANCIAL CORP COM _____ _____ _____	\$ 40,253.	11/30/2017
10	510 SHS PAYCHEX INC COM _____ _____ _____	\$ 34,247.	11/30/2017
11	105 SHS BLACKROCK INC COM _____ _____ _____	\$ 52,955.	11/30/2017
12	986 SHS CISCO SYS INC COM _____ _____ _____	\$ 37,024.	11/30/2017

Name of organization SUGAR FAMILY FOUNDATION	Employer identification number 47-3980241
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Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed

(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
13	943 SHS INTEL CORP COM _____ _____ _____	\$ 42,211.	11/30/2017
14	298 SHS DIAGEO PLC SPON ADR NEW _____ _____ _____	\$ 41,412.	11/30/2017
_____	_____ _____ _____ _____	\$ _____	_____
_____	_____ _____ _____ _____	\$ _____	_____
_____	_____ _____ _____ _____	\$ _____	_____
_____	_____ _____ _____ _____	\$ _____	_____

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
USGI REPORTED AS NONQUALIFIED DIVIDENDS	2,157.	2,157.
FOREIGN DIVIDENDS	6,345.	6,345.
NONDIVIDEND DISTRIBUTIONS	946.	
DOMESTIC DIVIDENDS	12,217.	12,217.
OTHER INTEREST	124.	124.
EXEMPT INTEREST NOT SUBJECT TO AMT - STA		
OID INCOME ON USGI	12.	12.
US GOVERNMENT INTEREST REPORTED AS QUALI	11.	11.
NONQUALIFIED FOREIGN DIVIDENDS	3,023.	3,023.
NONQUALIFIED DOMESTIC DIVIDENDS	22,413.	22,413.
TOTAL	47,248.	46,302.

FORM 990PF, PART I - ACCOUNTING FEES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE	3,500.			3,500.
TOTALS	3,500.	NONE.	NONE	3,500.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
UST-MLT FEES AS AGENT	7,636.	4,581.	3,054.
UST-MLT FEES AS AGENT	7,636.	4,581.	3,054.
TOTALS	15,272.	9,162.	6,108.

FORM 990PF, PART I - TAXES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
FOREIGN TAXES	508.	508.
EXCISE TAX - PRIOR YEAR	11,354.	
EXCISE TAX ESTIMATES	17,444.	
FOREIGN TAXES ON NONQUALIFIED	254.	254.
	-----	-----
TOTALS	29,560.	762.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
-----	-----	-----	-----
OTHER INVESTMENT FEE	150.	150.	
OTHER INVESTMENT FEE	150.	150.	
STATE FILING FEE	10.		10.
INVTMT EXPENSE	64.	64.	
TOTALS	374.	364.	10.
	=====	=====	=====

SUGAR FAMILY FOUNDATION

47-3980241

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

=====

DESCRIPTION

BEGINNING
BOOK VALUE

BEGBALANCE

44,988.

TOTALS

44,988.

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SUGAR FAMILY FOUNDATION

47-3980241

FORM 990PF, PART II - OTHER INVESTMENTS

=====

DESCRIPTION	COST/ FMV C OR F	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
921908844 VANGUARD DIVIDEND	C		61,729.	70,226.
74441K503 PRUDENTIAL JENNISON	C		23,288.	25,991.
29875E100 AMERICAN EURO PACIFI	C		14,778.	16,774.
461418287 ARISTOTLE/SAUL GLOBA	C		20,826.	25,681.
44134R834 HOTCHKIS & WILEY VAL	C		42,164.	49,490.
09252M883 BLACKROCK BOND FUND	C		142,871.	143,515.
73937B746 POWERSHARES KBW BANK	C		22,261.	24,367.
73936T763 POWERSHARES FTSE RAF	C		60,532.	68,857.
464288448 SHARES DJ EPAC SEL D	C		31,402.	34,231.
464286525 ISHARES TRUST SHS IS	C		42,003.	42,919.
09252X509 BLACKROCK WORLD	C		67,149.	67,078.
00768D798 POPLAR FOREST PARTNE	C		49,191.	49,520.
00766Y299 KOPERNIK GLOBAL ALL	C		40,142.	47,566.
921909768 VANGUARD TOTAL INTL	C		194,342.	226,950.
72201M867 PIMCO ALL ASSET	C		23,968.	24,825.
72201M719 PIMCO INCOME FUND CL	C		173,606.	176,720.
277902573 EATON VANCE RCHRD BR	C		23,918.	25,883.
64128K751 NEUBERGER BERMAN STR	C		87,892.	88,565.
56166Y404 TORTOISE MLP &	C		24,796.	27,538.
543916464 LORD ABBETT SHORT	C		106,831.	106,050.
46434V621 ISH TR CORE DIVID GR	C		59,979.	70,019.
97717X669 WISDOMTREE TR	C		58,301.	69,462.
92647K507 VICTORY MUNDER INTL	C		19,460.	23,421.
74441J829 PRUDENTIAL ABSOLUTE	C		87,557.	88,546.
577130867 MATTHEWS ASIA PACIFI	C		19,639.	22,216.
92913L684 VOYA INTERMEDIATE	C		95,669.	95,515.
922908769 VANGUARD INDEX TR VA	C		306,766.	368,334.
44134R800 HOTCHKIS & WILEY FDS	C		40,947.	43,602.
939330825 AMER FUNDS WASHINGTON	C		15,581.	17,028.

SUGAR FAMILY FOUNDATION

47-3980241

FORM 990PF, PART II - OTHER INVESTMENTS

COST/
FMV

ENDING
FMV

ENDING
BOOK VALUE

BEGINNING
BOOK VALUE

C OR F

DESCRIPTION

DESCRIPTION	C OR F	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
92189F106 VANECK VECTORS GOLD	C	1,355,133.	23,126.	25,796.
90386H404 LYRICAL US VALUE EQU	C		29,577.	31,060.
464285105 ISHARES COMEX GOLD T	C		78,866.	81,653.
317609295 SEAFARER OVERSEAS GR	C		24,248.	26,753.
023375827 AMER FUNDS AMCAP	C		15,281.	17,025.
76881N202 RIVERNORTH DOUBLE LI	C		131,411.	131,731.
74441P866 PRUDENTIAL JENNISON	C		45,502.	49,777.
BEGBALANCE	C	1,355,133.		
TOTALS		1,355,133.	2,305,599.	2,504,684.

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES
=====

DESCRIPTION -----	AMOUNT -----
COST BASIS ADJUSTMENT	3,454.
2016 CHECKS CLEARED IN 2017	10,000.

TOTAL	13,454.
	=====