

Form **990-PF**

Return of Private Foundation

OMB No 1545-0052

2018

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.

For calendar year **2018** or tax year beginning **2018**, and ending **20**

Name of foundation **SUGAR FAMILY FOUNDATION** **RONA**
A Employer identification number **47-3980241**

Number and street (or P O box number if mail is not delivered to street address) Room/suite
P.O. BOX 1501, NJ2-130-03-31
B Telephone number (see instructions) **609-274-6834**

City or town, state or province, country, and ZIP or foreign postal code
PENNINGTON, NJ 08534-1501
C If exemption application is pending, check here **6**

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

H Check type of organization: Section 501(c)(3) exempt private foundation **04**
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation

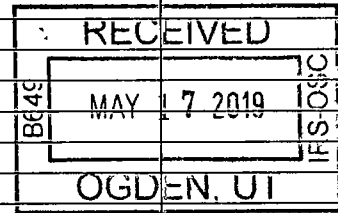
I Fair market value of all assets at end of year (from Part II, col (c), line 16) **\$ 3,601,144.**
J Accounting method: Cash Accrual
 Other (specify) _____
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	2,000,236.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B.				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	87,356.	85,765.		STMT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-15,230.			
b Gross sales price for all assets on line 6a 3,830,533.				
7 Capital gain net income (from Part IV, line 2)		877,847.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	200.			STMT 2
12 Total Add lines 1 through 11	2,072,562.	963,612.		

13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages		NONE	NONE	
15 Pension plans, employee benefits		NONE	NONE	
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule) STMT 3	2,500.	NONE	NONE	2,500.
c Other professional fees (attach schedule) STMT 4	28,319.	16,991.		11,328.
17 Interest				
18 Taxes (attach schedule) (see instructions) STMT 5	20,105.	1,540.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings		NONE	NONE	
22 Printing and publications		NONE	NONE	
23 Other expenses (attach schedule) STMT 6	577.	567.		10.
24 Total operating and administrative expenses. Add lines 13 through 23.	51,501.	19,098.	NONE	13,838.
25 Contributions, gifts, grants paid	627,300.			627,300.
26 Total expenses and disbursements Add lines 24 and 25	678,801.	19,098.	NONE	641,138.

27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	1,393,761.			
b Net investment income (if negative, enter -0-)		944,514.		
c Adjusted net income (if negative, enter -0-)				



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Operating and Administrative Expenses JUN 19 2019

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	2.	4,280.	4,280.
	2	Savings and temporary cash investments	59,530.	299,857.	299,857.
	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)			
	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.	2,305,599.	3,241,112.	3,297,007.
	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)	2,365,131.	3,545,249.	3,601,144.	
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	2,365,131.	3,545,249.		
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)	2,365,131.	3,545,249.		
31	Total liabilities and net assets/fund balances (see instructions)	2,365,131.	3,545,249.		

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	2,365,131.
2	Enter amount from Part I, line 27a	2	1,393,761.
3	Other increases not included in line 2 (itemize) ▶ INCOME ADJUSTMENT	3	298.
4	Add lines 1, 2, and 3	4	3,759,190.
5	Decreases not included in line 2 (itemize) ▶ ADJUST MARKET TO TAX COST	5	213,941.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,545,249.

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 3,829,255.		2,951,408.	877,847.	
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			877,847.	
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	877,847.
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))
2017	653,118.	1,738,400.	0.375701
2016	957,599.	1,482,314.	0.646016
2015	286,412.	326,884.	0.876188
2014			
2013			

2 Total of line 1, column (d)	2	1.897905
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	0.632635
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	3,057,166.
5 Multiply line 4 by line 3	5	1,934,070.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	9,445.
7 Add lines 5 and 6	7	1,943,515.
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	641,138.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

Table with 11 rows for excise tax calculations. Includes items like 'Exempt operating foundations', 'Domestic foundations', 'Tax under section 511', 'Credits/Payments', and 'Tax due'. Total tax due is 3,455.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, political expenditures, and substantial contributors. Includes handwritten 'CA' and '2'.

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 AMERICAN BOULEVARD, 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 2018, 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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input 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 <input type="checkbox"/> 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 2018?		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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <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)		
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 2018 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 2018)		
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 2018?		X

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

5a During the year, did the foundation pay or incur any amount to... (1) Carry on propaganda... (2) Influence the outcome of any specific public election... (3) Provide a grant to an individual for travel... (4) Provide a grant to an organization other than a charitable... (5) Provide for any purpose other than religious... b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify... c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax... 6a Did the foundation, during the year, receive any funds... 6b Did the foundation, during the year, pay premiums... 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 7b If "Yes," did the foundation receive any proceeds... 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(s) during the year?

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

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

Table with 5 columns: (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. Rows include RONALD D SUGAR and VALERIE S SUGAR.

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

Table with 5 columns: (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. Row 1 contains NONE.

Total number of other employees paid over \$50,000 NONE

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	
All other program-related investments See instructions	
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	2,957,650.
b	Average of monthly cash balances	1b	146,072.
c	Fair market value of all other assets (see instructions).	1c	NONE
d	Total (add lines 1a, b, and c)	1d	3,103,722.
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	3,103,722.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	46,556.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,057,166.
6	Minimum investment return. Enter 5% of line 5	6	152,858.

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	152,858.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	18,890.
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	18,890.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	133,968.
4	Recoveries of amounts treated as qualifying distributions.	4	NONE
5	Add lines 3 and 4	5	133,968.
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	133,968.

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	641,138.
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	641,138.
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	641,138.

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				133,968.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			NONE	
b Total for prior years 20____,20____,20____		NONE		
3 Excess distributions carryover, if any, to 2018				
a From 2013	NONE			
b From 2014	NONE			
c From 2015	276,654.			
d From 2016	900,927.			
e From 2017	586,772.			
f Total of lines 3a through e	1,764,353.			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>641,138.</u>				
a Applied to 2017, 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 2018 distributable amount				133,968.
e Remaining amount distributed out of corpus.	507,170.			
5 Excess distributions carryover applied to 2018 (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	2,271,523.			
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 2017 Subtract line 4a from line 2a Taxable amount - see instructions			NONE	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				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 2013 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	2,271,523.			
10 Analysis of line 9				
a Excess from 2014	NONE			
b Excess from 2015	276,654.			
c Excess from 2016	900,927.			
d Excess from 2017	586,772.			
e Excess from 2018	507,170.			

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 2018, 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)

Table with columns: Tax year (a) 2018, (b) 2017, (c) 2016, (d) 2015, (e) Total. Rows include: 2a Adjusted net income, b 85% of line 2a, c Qualifying distributions from Part XII, d Amounts included in line 2c not used directly for active conduct, e Qualifying distributions made directly for active conduct, 3 Complete 3a, b, or c for the alternative test relied upon (Assets, Endowment, Support).

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 [X] 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				
CONNECTING CULTURES MOBILE MUSEUM 2558 AIKEN AVE LOS ANGELES CA 90064-3306	N/A	PC	UNRESTRICTED GENERAL SUPPORT	700.
UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY PARK LOS ANGELES CA 90089-0001	N/A	PC	UNRESTRICTED GENERAL SUPPORT	100,000.
LOS ANGELES PHILHARMONIC ASSOCIATION 151 S GRAND AVE LOS ANGELES CA 90012-3034	N/A	PC	UNRESTRICTED GENERAL SUPPORT	160,000.
THE UCLA FOUNDATION 10920 WILSHIRE BLVD, STE 900 LOS ANGELES CA	N/A	PC	UNRESTRICTED GENERAL SUPPORT	340,000.
DESERT COMMUNITY FOUNDATION 75105 MERLE DR STE 300 PALM DESERT CA 92211-	N/A	PC	UNRESTRICTED GENERAL SUPPORT	100.
ALLIANCE FOR COLLEGE READY PUBLIC SCHOOLS 601 S FIGUEROA ST 4TH FL LOS ANGELES CA 9001	N/A	PC	UNRESTRICTED GENERAL SUPPORT	26,000.
BOYS & GIRLS CLUB OF COACHELLA VALLEY 42600 COOK ST STE 120 PALM DESERT CA 92211-5	N/A	PC	UNRESTRICTED GENERAL SUPPORT	500.
Total ▶ 3a				627,300.
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. and 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

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

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) Yes No X

(2) Other assets 1a(2) Yes No X

b Other transactions

(1) Sales of assets to a noncharitable exempt organization 1b(1) Yes No X

(2) Purchases of assets from a noncharitable exempt organization 1b(2) Yes No X

(3) Rental of facilities, equipment, or other assets 1b(3) Yes No X

(4) Reimbursement arrangements 1b(4) Yes No X

(5) Loans or loan guarantees 1b(5) Yes No X

(6) Performance of services or membership or fundraising solicitations 1b(6) Yes No X

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 1c Yes No X

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

Under penalty 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.

Sign Here

[Signature]
Signature of officer or trustee

5/7/19
Date

Trustee
Title

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

Paid Preparer Use Only	Print/Type preparer's name KAREN J KISER	Preparer's signature <i>Karen J Kiser</i>	Date 05/01/2019	Check <input type="checkbox"/> if self-employed	PTIN P00146417
	Firm's name BANK OF AMERICA	Firm's EIN 94-1687665			
	Firm's address P O BOX 1802 PROVIDENCE, RI 02901-1802	Phone no 888-866-3275			

Schedule of Contributors

2018

▶ 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 (entering "N/A" in column (b) instead of the contributor name and address), 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
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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
1	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>500,054.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>500,092.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
3	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>500,042.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
4	<u>RONALD AND VALERIE SUGAR</u> <u>228 COPA DE ORO RD</u> <u>LOS ANGELES, CA 90077-3804</u>	\$ <u>500,048.</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	_____ _____ _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

SUGAR FAMILY FOUNDATION

47-3980241

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
1	3475 SHS VANGUARD TOTAL STOCK MARKET	\$ 500,054.	06/20/2018
2	3379 SHS VANGUARD TOTAL STOCK MARKET	\$ 500,092.	08/22/2018
3	3514 SHS VANGUARD TOTAL STOCK MARKET	\$ 500,042.	10/18/2018
4	3660 SHS VANGUARD TOTAL STOCK MARKET	\$ 500,048.	12/12/2018
		\$	
		\$	

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
USGI REPORTED AS NONQUALIFIED DIVIDENDS	4,276.	4,276.
FOREIGN DIVIDENDS	11,766.	11,766.
NONDIVIDEND DISTRIBUTIONS	1,591.	
DOMESTIC DIVIDENDS	19,539.	19,539.
OTHER INTEREST	14.	14.
US GOVERNMENT INTEREST REPORTED AS QUALI	74.	74.
NONQUALIFIED FOREIGN DIVIDENDS	3,980.	3,980.
NONQUALIFIED DOMESTIC DIVIDENDS	46,116.	46,116.
TOTAL	87,356.	85,765.

FORM 990PF, PART I - OTHER INCOME
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----
FEDERAL TAX REFUND	200.
TOTALS	----- 200. =====

FORM 990PF, PART I - ACCOUNTING FEES
=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEES	2,500.			2,500.
TOTALS	2,500.	NONE	NONE	2,500.

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	28,319.	16,991.	11,328.
TOTALS	28,319.	16,991.	11,328.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	1,148.	1,148.
EXCISE TAX - PRIOR YEAR	3,130.	
EXCISE TAX ESTIMATES	15,435.	
FOREIGN TAXES ON NONQUALIFIED	392.	392.
TOTALS	20,105.	1,540.

SUGAR FAMILY FOUNDATION

47-3980241

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	267.	267.	
TOTALS	577.	567.	10.
	=====	=====	=====

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.	89,404.	91,426.
74441K503 PRUDENTIAL JENNISON	C	23,288.		
29875E100 AMERICAN EURO PACIFI	C	14,778.	75,800.	71,383.
461418287 ARISTOTLE/SAUL GLOBA	C	20,826.	51,937.	53,180.
44134R834 HOTCHKIS & WILEY VAL	C	42,164.	68,573.	61,890.
09252M883 BLACKROCK BOND FUND	C	142,871.		
73937B746 POWERSHARES KBW BANK	C	22,261.		
73936T763 POWERSHARES FTSE RAF	C	60,532.		
464288448 SHARES DJ EPAC SEL D	C	31,402.		
464286525 ISHARES TRUST SHS IS	C	42,003.		
09252X509 BLACKROCK WORLD	C	67,149.		
00768D798 POPLAR FOREST PARTNE	C	49,191.	79,364.	62,928.
00766Y299 KOPERNIK GLOBAL ALL	C	40,142.	61,570.	60,974.
921909768 VANGUARD TOTAL INTL	C	194,342.	301,201.	280,687.
72201M867 PIMCO ALL ASSET	C	23,968.		
72201M719 PIMCO INCOME FUND CL	C	173,606.		
277902573 EATON VANCE RCHRD BR	C	23,918.	91,842.	87,200.
64128K751 NEUBERGER BERMAN STR	C	87,892.	116,501.	110,706.
56166Y404 TORTOISE MLP &	C	24,796.	38,109.	33,640.
543916464 LORD ABBETT SHORT	C	106,831.		
46434V621 ISH TR CORE DIVID GR	C	59,979.	88,719.	91,574.
97717X669 WISDOMTREE US QUALIT	C	58,301.	89,783.	91,533.
92647K507 VICTORY MUNDER INTL	C	19,460.		
74441J829 PRUDENTIAL ABSOLUTE	C	87,557.	125,425.	121,514.
577130867 MATTHEWS ASIA PACIFI	C	19,639.		
92913L684 VOYA INTERMEDIATE	C	95,669.		
922908769 VANGUARD TOTAL STOCK	C	306,766.	378,149.	475,859.
44134R800 HOTCHKIS & WILEY FDS	C	40,947.	64,687.	55,447.
939330825 AMER FUNDS WASHINGTO	C	15,581.	47,674.	48,288.

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
92189F106 VANECK VECTORS GOLD	C	23,126.		
90386H404 LYRICAL US VALUE EQU	C	29,577.		
464285105 ISHARES COMEX GOLD T	C	78,866.		
317609295 SEAFARER OVERSEAS GR	C	24,248.	47,634.	47,558.
023375827 AMER FUNDS AMCAP	C	15,281.		
76881N202 RIVERNORTH DOUBLE LI	C	131,411.		
74441P866 PRUDENTIAL JENNISON	C	45,502.	36,889.	32,432.
74676P698 PUTNAM SHORT DURATIO	C		187,478.	187,478.
46138E628 INVESCO KBW BANK ETF	C		36,105.	31,798.
746792407 PUTNAM INCOME FUND C	C		59,011.	59,003.
46434G855 ISHARES MSCI GLOBAL	C		27,055.	30,348.
22544R305 CREDIT SUISSE COMMOD	C		31,420.	29,634.
302544101 FPA NEW INCOME INC C	C		58,554.	58,670.
78463V107 SPDR GOLD TRUST	C		92,666.	98,698.
72201M594 PIMCO SHORT-TERM FUN	C		225,384.	222,636.
246248587 DELAWARE DIVERSIFIED	C			
46138E727 INVESCO FTSE RAFI	C		76,714.	115,114.
258620301 DOUBLELINE CORE FIXE	C		231,950.	233,008.
33734X127 FIRST TR ENERGY ALPH	C		34,775.	32,101.
46432F834 ISHARES CORE MSCI TO	C		190,118.	184,485.
72201M792 PIMCO FLOATING INCOM	C		136,621.	135,815.
TOTALS		2,305,599.	3,241,112.	3,297,007.