

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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

Open to Public Inspection

For calendar year 2021, or tax year beginning 01-01-2021 , and ending 12-31-2021

Name of foundation THE ABELARD FOUNDATION INC		A Employer identification number 13-6064580
Number and street (or P.O. box number if mail is not delivered to street address) CO HEWITT 50 SUTTON PL SOUTH 6G	Room/suite	B Telephone number (see instructions) (212) 572-6351
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10022		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>11,869,376</u>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis.)</i>	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions.)</i>		(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)	143,000			
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	236,830	236,830		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	679,068			
b	Gross sales price for all assets on line 6a <u>1,500,822</u>				
7	Capital gain net income (from Part IV, line 2)		679,068		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	1,058,898	915,898		
13	Compensation of officers, directors, trustees, etc.	0	0		0
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)	30,320	15,160		15,160
c	Other professional fees (attach schedule)	124,610	90,610		34,000
17	Interest				
18	Taxes (attach schedule) (see instructions)				
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule)	1,504	0		1,504
24	Total operating and administrative expenses. Add lines 13 through 23	156,434	105,770		50,664
25	Contributions, gifts, grants paid	424,000			424,000
26	Total expenses and disbursements. Add lines 24 and 25	580,434	105,770		474,664
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	478,464			
b	Net investment income (if negative, enter -0-)		810,128		
c	Adjusted net income (if negative, enter -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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	4,633	3,002	3,002
	2 Savings and temporary cash investments	187,309	128,483	128,483
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	3,854,724	4,238,227	8,654,037
	c Investments—corporate bonds (attach schedule)	2,888,188	3,043,606	3,083,854
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	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)	6,934,854	7,413,318	11,869,376	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue.			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22).	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	5,957,394	5,957,394	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	977,460	1,455,924	
29 Total net assets or fund balances (see instructions)	6,934,854	7,413,318		
30 Total liabilities and net assets/fund balances (see instructions)	6,934,854	7,413,318		

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	6,934,854
2 Enter amount from Part I, line 27a	2	478,464
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	7,413,318
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	7,413,318

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.)
1 a PUBLICLY TRADED SECURITIES	P	2005-08-23	2021-12-02
b PROCEEDS FROM SECURITY LITIGATION	P	2021-05-20	2021-12-02
c OTHER	P	2021-12-31	2021-12-31
d CAPITAL GAINS DIVIDENDS	P		
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 1,457,154		821,754	635,400
b 199			199
c 1,757			1,757
d 41,712			41,712
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			635,400
b			199
c			1,757
d			41,712
e			

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	679,068
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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	
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Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

Exempt operating foundations described in section 4940(d)(2), check here [] and enter [] Bracket for line 1a "N/A" on line 1.
1a Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)
b Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)
2 Add lines 1 and 2.
3 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)
4 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.
5 Credits/Payments:
6a 2021 estimated tax payments and 2020 overpayment credited to 2021
6b Exempt foreign organizations—tax withheld at source
6c Tax paid with application for extension of time to file (Form 8868)
6d Backup withholding erroneously withheld
7 Total credits and payments. Add lines 6a through 6d
8 Enter any penalty for underpayment of estimated tax. Check here [] if Form 2220 is attached.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.
11 Enter the amount of line 10 to be: Credited to 2022 estimated tax Refunded

Part VI-A Statements Regarding Activities

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?
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.
c Did the foundation file Form 1120-POL for this year?
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?
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?
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?
b If "Yes," has it filed a tax return on Form 990-T for this year?
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?
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?
7 Did the foundation have at least \$5,000 in assets at any time during the year?
8a Enter the states to which the foundation reports or with which it is registered (see instructions)
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?
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 2021 or the taxable year beginning in 2021?
10 Did any persons become substantial contributors during the tax year?

Part VI-A Statements Regarding Activities (continued)

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.			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			No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	Yes		
14	The books are in care of ▶ <u>SACKS PRESS LACHER PC</u> Telephone no. ▶ <u>(212) 682-6640</u> Located at ▶ <u>600 THIRD AVE NEW YORK NY</u> ZIP+4 ▶ <u>10016</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 15 <u> </u>			
16	At any time during calendar year 2021, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign	Yes	No	No

Part VI-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?	1a(1)	No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)	No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	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)?	1a(5)	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.)	1a(6)	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	
c	Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>		
d	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 2021?	1d	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 2021, did the foundation have any undistributed income (lines 6d and 6e, Part XII) for tax year(s) beginning before 2021? If "Yes," list the years ▶ 20____, 20____, 20____, 20____	2a	No
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?	3a	No
b	If "Yes," did it have excess business holdings in 2021 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 2021.)	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 2021?	4b	No

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

Table with 5 columns: Question (5a-8), Yes, No. Contains questions about foundation activities, disaster assistance, and tax shelter transactions.

Part VII 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

Main table with 5 columns: (a) Name and address, (b) Title and average hours per week, (c) Compensation (If not paid, enter -0-), (d) Contributions to employee benefit plans and deferred compensation, (e) Expense account, other allowances. Lists numerous board members and officers.

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, (c) Compensation, (d) Contributions to employee benefit plans and deferred compensation, (e) Expense account, other allowances.

Total number of other employees paid over \$50,000.

Part VII **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
CAPITAL BANK AND TRUST 6455 IRVINE CENTER DRIVE IRVINE, CA 92618	INVESTMENT MANAGEMENT	75,753

Total number of others receiving over \$50,000 for professional services. ▶

0

Part VIII- 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 VIII- 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 ▶ 0

Part IX 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	11,129,277
b	Average of monthly cash balances.	1b	447,292
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	11,576,569
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	11,576,569
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	173,649
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	11,402,920
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	570,146

Part X 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 IX, line 6.	1	570,146
2a	Tax on investment income for 2021 from Part V, line 5.	2a	11,261
b	Income tax for 2021. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	11,261
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	558,885
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	558,885
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 XII, line 1.	7	558,885

Part XI 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	
b	Program-related investments—total from Part VIII-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.	4	

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				558,885
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2021:				
a From 2016.	102,782			
b From 2017.	31,824			
c From 2018.				
d From 2019.	111,892			
e From 2020.				
f Total of lines 3a through e.	246,498			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ \$ <u>474,664</u>				
a Applied to 2020, but not more than line 2a			0	
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 2021 distributable amount				474,664
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2021. (If an amount appears in column (d), the same amount must be shown in column (a).)	84,221			84,221
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	162,277			
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 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2016 not applied on line 5 or line 7 (see instructions)	18,561			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a	143,716			
10 Analysis of line 9:				
a Excess from 2017	31,824			
b Excess from 2018				
c Excess from 2019.	111,892			
d Excess from 2020				
e Excess from 2021				

Part XIII Private Operating Foundations (see instructions and Part VI-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 2021, enter the date of the ruling

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year				(e) Total
	(a) 2021	(b) 2020	(c) 2019	(d) 2018	
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, 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 IX, 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 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).)

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.

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:
 SUSAN COLLINS
 16 GRASSHOPPER LANE
 LINCOLN, MA 01773
 (781) 259-8470

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

c Any submission deadlines:
 NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
 NONE

Part Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> AWOOD CENTER 2511 EAST FRANKLIN AVE SUITE 100 MINNEAPOLIS, MN 55406	NONE		SUPPORT	10,500
CENTRO HUMANITARIO PO BOX 3190 DENVER, CO 80201	NONE		SUPPORT	10,500
CHARLESTON AREA JUSTICE MINISTRY PO BOX 71416 NORTH CHARLESTON, SC 29415	NONE		SUPPORT	10,000
COMMUNITY LABOR UNITED - NEW ENGLAND UNITED FOR JUSTICE 8 BEACON ST 5TH FLOOR BOSTON, MA 01208	NONE		SUPPORT	12,000
DEMOCRACY NASHVILLE - PEOPLE'S ALLIANCE FOR TRANSIT HOUSING AND EMPLOYMENT 1813 PEARL ST NASHVILLE, TN 37203	NONE		SUPPORT	15,000
INSTITUTE FOR PUBLIC LEADERSHIP 3647 LAFAYETTE AVENUE STE 106 OMAHA, NE 68131	NONE		SUPPORT	10,000
PESTICIDE ACTION NETWORK 2029 UNIVERSITY AVENUE SUITE 200 BERKELEY, CA 94706	NONE		SUPPORT	10,500
RAINIER VALLEY CORPS 1225 S WELLER ST SUITE 400 SEATTLE, WA 98144	NONE		SUPPORT	10,500
SOCIAL & ENVIRONMENTAL ENTREPRENEURS 23532 CALABASAS ROAD SUITE A CALABASAS, CA 91302	NONE		SUPPORT	11,000
SOUTHERN MAINE WORKERS CENTER 56 NORTH ST SUITE 100 PORTLAND, ME 04101	NONE		SUPPORT	12,000
SOUTHWEST ORGANIZING PROJECT 211 10TH ST SW ALBUQUERQUE, NM 87102	NONE		SUPPORT	10,500
TIDES CENTER 1012 TORNEY AVENUE SAN FRANCISCO, CA 94129	NONE		SUPPORT	10,500
WASHINGTON COMMUNITY ACTION NETWORK EDUCATION & RESEARCH FUND 1806 E YESLER WAY SEATTLE, WA 98122	NONE		SUPPORT	11,000
ALIANZA AGRICOLA 23 MAIN ST GENESCO, NY 14454	NONE		SUPPORT	12,000
ARRIBA LAS VEGAS WORKER CENTER PO BOX 1941 LAS VEGAS, NV 89125	NONE		SUPPORT	10,000
COLEMAN CHILDREN AND YOUTH SERVICES 459 VIENNA ST SAN FRANCISCO, CA 94112	NONE		SUPPORT	10,500
COLORADO PEOPLE'S ALLIANCE (COPA) 700 KALAMATH ST DENVER, CO 80204	NONE		SUPPORT	10,500
COMUNIDADES ORGANIZANDO EL PODER Y LA ACCION LATINA (COPAL) 3702 E LAKE STREET MINNEAPOLIS, MN 55406	NONE		SUPPORT	10,500
DOWNWINDERS AT RISK EDUCATION FUND 1808 SUTH GOOD LATIMER EXPY 202 DALLAS, TX 75226	NONE		SUPPORT	10,500
THE HAWAI'I WORKERS CENTER 2252 PUNA ST HONOLULU, HI 96817	NONE		SUPPORT	11,000
ILLINOIS MUSLIM CIVIC COALITION 2425 W 22ND ST OAK BROOK, IL 60523	NONE		SUPPORT	12,000
LA CONEXION	NONE		SUPPORT	12,000

PO BOX 186 BOWLING GREEN, OH 43402				
METROPOLITAN CONGREGATIONS UNITED 4501 WESTMINISTER PLACE 3RD FLOOR SUITE 301 ST LOUIS, MO 63108	NONE		SUPPORT	10,500
MOVEMENT ALLIANCE PROJECT - MOVEMENT OF IMMIGRANT LEADERS IN PA 924 CHERRY ST 5TH FL PHILADELPHIA, PA 19107	NONE		SUPPORT	15,000
NATIVE JUSTICE COALITION PO BOX 1052 MANISTEE, MI 49660	NONE		SUPPORT	12,000
NATIVE MOVEMENT PO BOX 83467 FAIRBANKS, AK 99708	NONE		SUPPORT	10,500
NEO PHILANTHROPY 45 W 36TH ST 6TH FLOOR NEW YORK, NY 10018	NONE		SUPPORT	10,500
NORTH BAY JOBS WITH JUSTICE PO BOX 427 SANTA ROSA, CA 95402	NONE		SUPPORT	11,000
NEW YORK TAXI WORKERS ALLIANCE INC 37 E 28TH ST STE 302 NEW YORK, NY 10016	NONE		SUPPORT	10,000
NEXT UP 333 SE 2ND AVENUE PORTLAND, OR 97214	NONE		SUPPORT	10,500
ORLEANS PARISH PRISON REFORM COALITION 4035 WASHINGTON AVE NEW ORLEANS, LA 70125	NONE		SUPPORT	12,000
PADRES & JOVENES UNIDOS 3025 W 37TH AVE DENVER, CO 80211	NONE		SUPPORT	10,500
PROVIDENCE STUDENT UNION 775 WESTMINSTER ST PROVIDENCE, RI 02903	NONE		SUPPORT	12,000
SAFE & JUSTICE MICHIGAN - NATION OUTSIDE 521 SEYMOUR AVE LANSING, MI 48933	NONE		SUPPORT	15,000
SOCIAL AND ENVIRONMENTAL ENTREPRENEURS 23564 CALABASAS ROAD SUITE 201 CALABASAS, CA 91302	NONE		SUPPORT	10,500
AUTISTIC WOMEN & NONBINARY NETWORK INC 5100 VAN DORN ST UNIT 6633 LINCOLN, NE 68506	NONE		SUPPORT	10,000
SOUTHSIDE PRESBYTERIAN CHURCH 317 W 23RD STREET TUCSON, AZ 85713	NONE		SUPPORT	10,500
YOUTH RISE TEXAS PO BOX 824 AUSTIN, TX 78767	NONE		SUPPORT	10,500
Total			▶ 3a	424,000

b <i>Approved for future payment</i>				
Total			▶ 3b	0

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 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
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
9 Net income or (loss) from special events:
10 Gross profit or (loss) from sales of inventory
11 Other revenue: a
b
c
d
e

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes data for line 8 (18, 679,068) and line 13 (0, 915,898).

Part XV-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 XV-A contributed importantly to the accomplishment of the foundation's exempt purposes.

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2021 IRS 990 e-File Render

Name: THE ABELARD FOUNDATION INC

EIN: 13-6064580

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SACKS PRESS & LACHER, P.C.	30,320	15,160		15,160

TY 2021 IRS 990 e-File Render

Name: THE ABELARD FOUNDATION INC

EIN: 13-6064580

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIXED INCOME SECURITIES	3,043,606	3,083,854

TY 2021 IRS 990 e-File Render

Name: THE ABELARD FOUNDATION INC

EIN: 13-6064580

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITY SECURITIES	4,238,227	8,654,037

TY 2021 IRS 990 e-File Render

Name: THE ABELARD FOUNDATION INC

EIN: 13-6064580

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SUNDRY	310	0		310
FILING FEES	855	0		855
POSTAGE & DELIVERY	339	0		339

TY 2021 IRS 990 e-File Render

Name: THE ABELARD FOUNDATION INC

EIN: 13-6064580

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEE	90,610	90,610		0
CONSULTING	34,000	0		34,000