

Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public. Go to www.irs.gov/Form990PF for instructions and the latest information.

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For calendar year 2025, or tax year beginning 01 2025, and ending 31 2025

Form header section containing: Name of foundation (SDM FOUNDATION INC), Employer identification number (81-3817783), Address (406 MAIN STREET, MELROSE, MA), and various checkboxes for organization type and reporting methods.

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).)

Main table with 4 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 (13-26), ending with Subtotal (27).

**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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	35,036	11,220	11,220
	<b>2</b> Savings and temporary cash investments . . . . .	42,324	42,339	42,339
	<b>3</b> Accounts receivable _____ Less: allowance for doubtful accounts _____			
	<b>4</b> Pledges receivable _____ Less: allowance for doubtful accounts _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) _____ Less: allowance for doubtful accounts _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .		13,146	13,146
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .			
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b> Investments—land, buildings, and equipment: basis _____ Less: accumulated depreciation (attach schedule) _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .	4,228,391	4,223,317	4,223,317
	<b>14</b> Land, buildings, and equipment: basis _____ <u>824,906</u> Less: accumulated depreciation (attach schedule) _____ <u>143,361</u>	702,555	681,545	681,545
<b>15</b> Other assets (describe _____)				
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	5,008,306	4,971,567	4,971,567	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue. . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .	504,486	488,335	
	<b>22</b> Other liabilities (describe _____)			
<b>23 Total liabilities</b> (add lines 17 through 22)	504,486	488,335		
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .	4,503,820	4,483,232	
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund			
<b>28</b> Retained earnings, accumulated income, endowment, or other funds				
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	4,503,820	4,483,232		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	5,008,306	4,971,567		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	4,503,820
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-94,724
<b>3</b> Other increases not included in line 2 (itemize) _____	<b>3</b>	74,136
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	4,483,232
<b>5</b> Decreases not included in line 2 (itemize) _____	<b>5</b>	0
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, line 29, column (b)	<b>6</b>	4,483,232

**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.)
<b>1 a</b> VIA FIDELITY				
<b>b</b> VIA FIDELITY				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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)	
<b>a</b> 1,030,286		752,678	277,608	
<b>b</b> 93,950		88,130	5,820	
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
<b>a</b>			277,608	
<b>b</b>			5,820	
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b> 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 }		<b>2</b>	283,428
<b>3</b> 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	}		<b>3</b>	5,820

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

<b>1a</b> 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>1</b>		5,079
<b>b</b> All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)			
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>		0
<b>3</b> Add lines 1 and 2.	<b>3</b>		5,079
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>		0
<b>5 Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-.	<b>5</b>		5,079
<b>6 Credits/Payments:</b>			
<b>a</b> 2025 estimated tax payments and 2024 overpayment credited to 2025	<b>6a</b>	6,520	
<b>b</b> Exempt foreign organizations—tax withheld at source	<b>6b</b>	0	
<b>c</b> Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	0	
<b>d</b> Backup withholding erroneously withheld	<b>6d</b>	0	
<b>7</b> Total credits and payments. Add lines 6a through 6d	<b>7</b>	6,520	
<b>8</b> Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	<b>8</b>	0	
<b>9 Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>		
<b>10 Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid.</b>	<b>10</b>	1,441	
<b>11</b> Enter the amount of line 10 to be: <b>Credited to 2026 estimated tax</b> <b>Refunded</b> 1,441	<b>11</b>	0	
For Refunded amount, also complete and attach Form 8050. See instructions.			

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. . . . .  
*If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*
- c** Did the foundation file **Form 1120-POL** for this year? . . . . .
- d** Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  
**(1)** On the foundation. \$ 0 **(2)** On foundation managers. \$ 0
- e** Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0
- 2** Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .  
*If "Yes," attach a detailed description of the activities.*
- 3** Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes* . . . . .
- 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?  
*If "Yes," attach the statement required by General Instruction T.* . . . . .
- 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? *If "Yes," complete Part II, col. (c), and Part XIV.* . . . . .
- 8a** Enter the states to which the foundation reports or with which it is registered (see instructions)  
MA
- b** If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation* . . . . .
- 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 2025 or the taxable year beginning in 2025? See the instructions for Part XIII. *If "Yes," complete Part XIII* . . . . .
- 10** Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.* . . . . .
- 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.* . . . . .
- 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* . . . . .
- 13** Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.SDMFOUNDATION.ORG

	Yes	No
<b>1a</b>		No
<b>1b</b>		No
<b>1c</b>		No
<b>2</b>		No
<b>3</b>		No
<b>4a</b>		No
<b>4b</b>		
<b>5</b>		No
<b>6</b>	Yes	
<b>7</b>	Yes	
<b>8b</b>	Yes	
<b>9</b>	Yes	
<b>10</b>		No
<b>11</b>		No
<b>12</b>		No
<b>13</b>	Yes	

**14** The books are in care of KRISTIN THORP Telephone no. (781) 606-2621  
Located at 406 MAIN STREET MELROSE MA ZIP+4 02176

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

**16** At any time during calendar year 2025, 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 country

	Yes	No
<b>16</b>		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.**

**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? . . . . .
- (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . .
- (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
- (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
- (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)? . . . . .
- (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.)

**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

**c** Organizations relying on a current notice regarding disaster assistance check here.

**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 2025? . . . . .

**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 2025, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2025? . . . . .

If "Yes," list the years 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_

**b** Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.) . . . . .

**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? . . . . .

**b** If "Yes," did it have excess business holdings in 2025 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2025.)

**4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .

**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 2025?

	Yes	No
<b>1a(1)</b>		No
<b>1a(2)</b>		No
<b>1a(3)</b>		No
<b>1a(4)</b>	Yes	
<b>1a(5)</b>		No
<b>1a(6)</b>		No
<b>1b</b>		No
<b>1d</b>		No
<b>2a</b>		No
<b>2b</b>		
<b>3a</b>		No
<b>3b</b>		
<b>4a</b>		No
<b>4b</b>		No

**Part VI-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, or otherwise attempt to influence legislation (section 4945(e))?
  - (2)** Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
  - (3)** Provide a grant to an individual for travel, study, or other similar purposes?
  - (4)** Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions
  - (5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
- b** If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions
- c** Organizations relying on a current notice regarding disaster assistance check
- d** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  
If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  
If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
- b** If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
- 8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

	Yes	No
<b>5a(1)</b>		No
<b>5a(2)</b>		No
<b>5a(3)</b>		No
<b>5a(4)</b>		No
<b>5a(5)</b>		No
<b>5b</b>		
<b>5d</b>		
<b>6a</b>		No
<b>6b</b>		No
<b>7a</b>		No
<b>7b</b>		
<b>8</b>		No

**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**

(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
KRISTIN THORP 77 WENTWORTH RD MELROSE, MA 02176	PRESIDENT/DIRECTOR 35.00	90,385	0	0
MARIANNE LONG 25 WILLARD ST MELROSE, MA 02176	DIRECTOR 1.00	0	0	0
SALLY STUBBS 8 BRAVEHART CT DURHAM, NC 27713	TREASURER/DIRECTOR 1.00	0	0	0
PATRICIA MUXIE 180 GREEN STREET 107 MELROSE, MA 02176	DIRECTOR/CLERK 1.00	0	0	0

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

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

**Total** number of other employees paid over \$50,000. 0

**Part 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
NONE		

**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
<p><b>1</b> SDM FOUNDATION, INC PROVIDES LESSONS ON A WIDE RANGE OF DIGITAL LITERACY TOPICS, FOR INDIVIDUALS, GROUPS AND SMALL BUSINESSES, BOTH IN PERSON AND REMOTELY. WE SERVE PEOPLE OF ALL AGES AND SKILL LEVELS, FROM SURROUNDING COMMUNITIES AND AT A DISTANCE. BECAUSE OUR SERVICES ARE FREE, WE ARE AVAILABLE TO PEOPLE OF ALL INCOME LEVELS. WE PATIENTLY HELP PEOPLE LEARN TO USE DEVICES, PROGRAMS, APPS, AND WEBSITES. OUR PROGRAMS ARE DESIGNED TO HELP PEOPLE GAIN THE SKILLS AND CONFIDENCE THEY NEED TO ENRICH THEIR LIVES USING DIGITAL DEVICES AND ONLINE SERVICES.</p>	359,819
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>Total.</b> Add lines 1 through 3 . . . . .	0

**Part IX Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	4,225,954
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	23,128
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, 1b, and 1c). . . . .	<b>1d</b>	4,249,082
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	4,249,082
<b>4</b>	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	63,736
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3.. . . .	<b>5</b>	4,185,346
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	209,267

**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.)

<b>1</b>	Minimum investment return from Part IX, line 6. . . . .	<b>1</b>	
<b>2a</b>	Tax on investment income for 2025 from Part V, line 5. . . . .	<b>2a</b>	
<b>b</b>	Income tax for 2025. (This does not include the tax from Part V.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . . .	<b>7</b>	

**Part XI Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, line 26, column (d). . . . .	<b>1a</b>	432,127
<b>b</b>	Program-related investments—total from Part VIII-B	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	<b>4</b>	432,127

**Part XII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2024	(c) 2024	(d) 2025
<b>1</b> Distributable amount for 2025 from Part X, line 7				
<b>2</b> Undistributed income, if any, as of the end of 2025:				
<b>a</b> Enter amount for 2024 only. . . . .				
<b>b</b> Total for prior years: 20___, 20___, 20___				
<b>3</b> Excess distributions carryover, if any, to 2025:				
<b>a</b> From 2020. . . . .				
<b>b</b> From 2021. . . . .				
<b>c</b> From 2022. . . . .				
<b>d</b> From 2023. . . . .				
<b>e</b> From 2024. . . . .				
<b>f</b> <b>Total</b> of lines 3a through e . . . . .				
<b>4</b> Qualifying distributions for 2025 from Part XI, line 4: \$ _____				
<b>a</b> Applied to 2024, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions) . . . . .				
<b>d</b> Applied to 2025 distributable amount				
<b>e</b> Remaining amount distributed out of corpus				
<b>5</b> Excess distributions carryover applied to 2025. (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .				
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2024. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .				
<b>f</b> Undistributed income for 2025. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2026				
<b>7</b> 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) . . . . .				
<b>8</b> Excess distributions carryover from 2020 not applied on line 5 or line 7 (see instructions)				
<b>9</b> <b>Excess distributions carryover to 2026.</b> Subtract lines 7 and 8 from line 6a				
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2021				
<b>b</b> Excess from 2022				
<b>c</b> Excess from 2023				
<b>d</b> Excess from 2024				
<b>e</b> Excess from 2025				

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 2025, enter the date of the ruling . . . . . 2017-02-14

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

Table with 6 columns: Tax year, (a) 2025, (b) 2024, (c) 2023, (d) 2022, (e) Total. Rows include 2a (Adjusted net income), 2b (85% of line 2a), 2c (Qualifying distributions), 2d (Amounts not used), 2e (Qualifying distributions made), 3a (Assets alternative test), 3b (Endowment alternative test), 3c (Support alternative test).

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 [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, 2b, 2c, and 2d. 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** **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
<b>a</b> <i>Paid during the year</i>				
<b>Total . . . . .</b>			<b>3a</b>	<b>0</b>
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b>			<b>3b</b>	<b>0</b>

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 rows for various income types and a total row at the bottom.

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 2025 IRS 990 e-File Render

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEE	2,015	1,008	1,007	0

**Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.**

**TY 2025 IRS 990 e-File Render**

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
OFFICE FURNITURE	2016-04-01	22,000	22,000	SL	7.000000000000	0	0	0	
APPLE IMAC	2016-07-01	9,720	9,720	SL	7.000000000000	0	0	0	
3 TABLET ARM CHAIRS	2016-06-02	2,048	2,048	SL	7.000000000000	0	0	0	
BUILDING	2020-12-08	762,939	79,882	SL	39.000000000000	19,563	0	19,563	
24" FRONT DESK IMAC	2021-11-15	1,899	1,899	SL	3.000000000000	0	0	0	
SIGNAGE	2021-10-18	2,673	711	SL	15.000000000000	178	0	178	
IMPROVEMENTS	2021-02-24	18,350	1,645	SL	39.000000000000	471	0	471	
THINKPAD 14S	2022-06-01	1,352	1,352	SL	3.000000000000	0	0	0	
MICROSOFT SURFACE	2022-06-01	1,530	1,530	SL	3.000000000000	0	0	0	
THINKPAD X1	2023-01-01	1,196	798	SL	3.000000000000	398	0	398	
APPLE	2023-02-01	1,199	766	SL	3.000000000000	400	0	400	

# TY 2025 IRS 990 e-File Render

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VIA FIDELITY INVESTMENTS	FMV	4,223,317	4,223,317

**TY 2025 IRS 990 e-File Render****Name:** SDM FOUNDATION INC**EIN:** 81-3817783

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE FURNITURE	22,000	22,000	0	
APPLE IMAC	9,720	9,720	0	
3 TABLET ARM CHAIRS	2,048	2,048	0	
BUILDING	762,939	99,445	663,494	
24" FRONT DESK IMAC	1,899	1,899	0	
SIGNAGE	2,673	889	1,784	
IMPROVEMENTS	18,350	2,116	16,234	
THINKPAD 14S	1,352	1,352	0	
MICROSOFT SURFACE	1,530	1,530	0	
THINKPAD X1	1,196	1,196	0	
APPLE	1,199	1,166	33	

# TY 2025 IRS 990 e-File Render

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEE	262	262	0	0

# TY 2025 IRS 990 e-File Render

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSE	8,973	0	897	8,076
PAYROLL PROCESSING FEE	1,982	0	198	1,784
SOFTWARE, LICENSES, AND MEMBERSHIPS	2,106	0	211	1,895
UTILITIES	14,530	0	1,453	13,077
INSURANCE	4,178	0	418	3,760
MORTGAGE INTEREST	17,640	0	1,764	15,876
PROMOTIONAL/EVENTS	315	0	31	283

# TY 2025 IRS 990 e-File Render

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	74,136

# TY 2025 IRS 990 e-File Render

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
IT AND COMPUTER CONSULTING EXPENSES	16,271	0	0	16,271
FINANCIAL EXPENSES	17,223	17,223	0	0

# TY 2025 IRS 990 e-File Render

**Name:** SDM FOUNDATION INC

**EIN:** 81-3817783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	29,342	0	0	29,342
FOREIGN TAX PAID	949	0	0	0
STATE FILING FEE	70	0	0	0
2025 ESTIMATED TAXES	6,520	0	0	0
2024 FEDERAL BAL. DUE	2,291	0	0	0