

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

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For calendar year 2024, or tax year beginning 07-01-2024, and ending 06-30-2025

Name of foundation: FRESH SOUND FOUNDATION INC. A Employer identification number: 06-1428363. B Telephone number: (617) 354-3814. C If exemption application is pending, check here. D 1. Foreign organizations, check here. D 2. Foreign organizations meeting the 85% test, check here and attach computation. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$10,728,032. J Accounting method: Cash.

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).)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include: 1 Contributions, gifts, grants, etc., received; 2 Check if foundation is not required to attach Sch. B; 3 Interest on savings and temporary cash investments; 4 Dividends and interest from securities; 5a Gross rents; b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10; b Gross sales price for all assets on line 6a; 7 Capital gain net income; 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); 11 Other income; 12 Total. Add lines 1 through 11; 13 Compensation of officers, directors, trustees, etc.; 14 Other employee salaries and wages; 15 Pension plans, employee benefits; 16a Legal fees; b Accounting fees; c Other professional fees; 17 Interest; 18 Taxes; 19 Depreciation and depletion; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses; 24 Total operating and administrative expenses; 25 Contributions, gifts, grants paid; 26 Total expenses and disbursements; 27 Subtract line 26 from line 12; a Excess of revenue over expenses and disbursements; b Net investment income; c Adjusted net income.

**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 . . . . .	590,084	1,080,078	1,080,078
	<b>2</b> Savings and temporary cash investments . . . . .			
	<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 . . . . .			
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)	1,305,559	1,940,001	1,969,185
	<b>b</b> Investments—corporate stock (attach schedule)	4,303,396	3,573,758	6,073,770
	<b>c</b> Investments—corporate bonds (attach schedule)	1,272,750	1,371,331	1,363,287
	<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) . . . . .	307,602	241,712	241,712
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<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)	7,779,391	8,206,880	10,728,032	
<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) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22).	0	0	
<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 . . . . .	7,779,391	8,206,880	
	<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) . . . . .	7,779,391	8,206,880		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	7,779,391	8,206,880		

**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>	7,779,391
<b>2</b> Enter amount from Part I, line 27a	<b>2</b>	448,928
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	0
<b>4</b> Add lines 1, 2, and 3	<b>4</b>	8,228,319
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	21,439
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	<b>6</b>	8,206,880

Part IV Capital Gains and Losses for Tax on Investment Income

Table with columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include US Treasury, Garmin Ltd, Apple, Nextera Energy, Costco Wholesale Corp, etc.

Table with columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows show calculations for each asset from Part IV.

Table with columns: (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), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-). Rows show calculations for each asset from Part IV.

Summary rows for Part IV, including Capital gain net income or (net capital loss) and Tax short-term capital gain or (loss).

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

Table with columns: 1a Exempt operating foundations, 2 Tax under section 511, 3 Add lines 1 and 2, 4 Subtitle A (income) tax, 5 Tax based on investment income, 6 Credits/estimated tax, 7 Total credits and payments, 8 Enter any penalty, 9 Tax due, 10 Overpayment, 11 Enter the amount of line 10 to be: Credited to 2025 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?

Table with 3 columns: Question, Yes, No. Row 1a: Yes, No.

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.

Table with 3 columns: Question, Yes, No. Row 1b: Yes, No.

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

Table with 3 columns: Question, Yes, No. Row 1c: Yes, No.

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. (2) On foundation managers.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.

Table with 3 columns: Question, Yes, No. Row 2: Yes, No.

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes.

Table with 3 columns: Question, Yes, No. Row 3: Yes, No.

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

Table with 3 columns: Question, Yes, No. Row 4a: Yes, No.

b If "Yes," has it filed a tax return on Form 990-T for this year?

Table with 3 columns: Question, Yes, No. Row 4b: Yes, No.

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.

Table with 3 columns: Question, Yes, No. Row 5: Yes, No.

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

Table with 3 columns: Question, Yes, No. Row 6: Yes, No.

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.

Table with 3 columns: Question, Yes, No. Row 7: Yes, No.

8a Enter the states to which the foundation reports or with which it is registered (see instructions) CT

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.

Table with 3 columns: Question, Yes, No. Row 8b: Yes, No.

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 2024 or the taxable year beginning in 2024? See the instructions for Part XIII. If "Yes," complete Part XIII.

Table with 3 columns: Question, Yes, No. Row 9: Yes, No.

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

Table with 3 columns: Question, Yes, No. Row 10: 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.

Table with 3 columns: Question, Yes, No. Row 11: Yes, 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.

Table with 3 columns: Question, Yes, No. Row 12: Yes, No.

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address FRESHSOUNDFOUNDATION.ORG

Table with 3 columns: Question, Yes, No. Row 13: Yes, No.

14 The books are in care of TYLER LYNCH PC Telephone no. (617) 354-3814 Located at 186 ALEWIFE BROOK PARKWAY CAMBRIDGE MA ZIP+4 02138

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 2024, 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.

Table with 3 columns: Question, Yes, No. Row 16: Yes, 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 2024? . . . . .
- 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 2024, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2024? . . . . .
  - 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 2024 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 2024.) . . . . .
- 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 2024?

	Yes	No
<b>1a(1)</b>		No
<b>1a(2)</b>		No
<b>1a(3)</b>		No
<b>1a(4)</b>		No
<b>1a(5)</b>		No
<b>1a(6)</b>		No
<b>1b</b>		
<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...
(2) Influence the outcome of any specific public election...
(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...
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes...
b If any answer is "Yes" to 5a(1)-(5); did any of the transactions fail to qualify under the exceptions...
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...
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
6b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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 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?

Table with 3 columns: Question ID, Yes, No. Rows include 5a(1) through 8.

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

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. Includes entries for JOHN F BURT, S JEFFREY BURT, and LAURIE BURT.

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. First row contains 'NONE'.

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".**

<b>(a)</b> Name and address of each person paid more than \$50,000	<b>(b)</b> Type of service	<b>(c)</b> Compensation
KDN PHILANTHROPY CONSULTING 10 BLUEBERRY LANE HOPKINTON, MA 01748	PHILANTHROPY CONSULTING	80,795

**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
<b>1</b> _____ _____	
_____	
<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>3</b> _____ _____	
_____	

**Total.** 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>	9,515,860
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	501,705
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	311,140
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	10,328,705
<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>	10,328,705
<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>	154,931
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. . . . .	<b>5</b>	10,173,774
<b>6</b>	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5. . . . .	<b>6</b>	508,689

**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>	508,689
<b>2a</b>	Tax on investment income for 2024 from Part V, line 5. . . . .	<b>2a</b>	23,697
<b>b</b>	Income tax for 2024. (This does not include the tax from Part V.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	23,697
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	484,992
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	484,992
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<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>	484,992

**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, column (d), line 26. . . . .	<b>1a</b>	1,224,799
<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>	1,224,799

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

	(a) Corpus	(b) Years prior to 2023	(c) 2023	(d) 2024
<b>1</b> Distributable amount for 2024 from Part X, line 7				484,992
<b>2</b> Undistributed income, if any, as of the end of 2024:				
<b>a</b> Enter amount for 2023 only. . . . .			0	
<b>b</b> Total for prior years: 20 ____, 20 ____, 20 ____		0		
<b>3</b> Excess distributions carryover, if any, to 2024:				
<b>a</b> From 2019. . . . .	205,702			
<b>b</b> From 2020. . . . .	467,075			
<b>c</b> From 2021. . . . .	202,375			
<b>d</b> From 2022. . . . .	310,728			
<b>e</b> From 2023. . . . .	509,924			
<b>f</b> <b>Total</b> of lines 3a through e . . . . .	1,695,804			
<b>4</b> Qualifying distributions for 2024 from Part XI, line 4: ▶ \$ <u>1,224,799</u>				
<b>a</b> Applied to 2023, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2024 distributable amount . . . . .				484,992
<b>e</b> Remaining amount distributed out of corpus	739,807			
<b>5</b> Excess distributions carryover applied to 2024. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,435,611			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		0		
<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 . . . . .		0		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2023. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2024. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2025 . . . . .				0
<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) . . . . .	0			
<b>8</b> Excess distributions carryover from 2019 not applied on line 5 or line 7 (see instructions) . . . . .	205,702			
<b>9</b> <b>Excess distributions carryover to 2025.</b> Subtract lines 7 and 8 from line 6a . . . . .	2,229,909			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2020 . . . . .	467,075			
<b>b</b> Excess from 2021 . . . . .	202,375			
<b>c</b> Excess from 2022. . . . .	310,728			
<b>d</b> Excess from 2023 . . . . .	509,924			
<b>e</b> Excess from 2024 . . . . .	739,807			

**Part XIII Private Operating Foundations** (see instructions and Part VI-A, question 9)

<b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2024, enter the date of the ruling . . . . .					
<b>b</b> Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed . . . . .	Tax year	Prior 3 years			<b>(e) Total</b>
	<b>(a) 2024</b>	<b>(b) 2023</b>	<b>(c) 2022</b>	<b>(d) 2021</b>	
<b>b</b> 85% (0.85) of line 2a					
<b>c</b> Qualifying distributions from Part XI, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test—enter:					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . . . . .					
<b>c</b> "Support" alternative test—enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> 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).)

JOHN F BURT

S JEFFREY BURT

LAURIE BURT

**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 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
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i> ACADIA CENTER 15 COURT SQUARE STE 1000 BOSTON, MA 02108	N/A	NON-PROFIT	ENVIRONMENTAL	5,000
ALL VOTING IS LOCAL PO BOX 33727 WASHINGTON, DC 20033	N/A	NON-PROFIT	EDUCATIONAL	45,000
ALL VOTING IS LOCAL PO BOX 33727 WASHINGTON, DC 20033	N/A	NON-PROFIT	EDUCATIONAL	30,000
AMERICAN CONSTITUTION SOCIETY FOR LAW 1899 L STREET NW 2ND FL WASHINGTON, DC 20036	N/A	NON-PROFIT	EDUCATIONAL	40,000
AMMONOOSUC CONSERVATION TRUST 297 MAIN STREET UNIT 1 2ND FL FRANCONIA, NH 03580	N/A	NON-PROFIT	ENVIRONMENTAL	8,000
BIG SKY YOUTH EMPOWERMENT 255 E MENDENHALL STREET BOZEMAN, MT 59715	N/A	NON-PROFIT	EDUCATIONAL	10,000
CERES INC 99 CHAUNCY STREET 6TH FL BOSTON, MA 02111	N/A	NON-PROFIT	CHARITABLE	25,000
CERES INC 99 CHAUNCY STREET 6TH FL BOSTON, MA 02111	N/A	NON-PROFIT	CHARITABLE	25,000
CERES INC 99 CHAUNCY STREET 6TH FL BOSTON, MA 02111	N/A	NON-PROFIT	CHARITABLE	75,000
DEMOCRACY FORWARD FUND PO BOX 34553 WASHINGTON, DC 20043	N/A	NON-PROFIT	EDUCATIONAL	10,000
DISCOVERING JUSTICE 1 COURTHOUSE WAY BOSTON, MA 02210	N/A	NON-PROFIT	EDUCATIONAL	5,000
EMERSON COLLEGE 120 BOYLSTON STREET STE 414 BOSTON, MA 02116	N/A	NON-PROFIT	EDUCATIONAL	40,000
FACING HISTORY AND OURSELVES 89 SOUTH STREET STE 401 BOSTON, MA 02111	N/A	NON-PROFIT	EDUCATIONAL	10,000
FAIR COUNT INC PO BOX 170382 ATLANTA, GA 30317	N/A	NON-PROFIT	EDUCATIONAL	35,000
FAIR COUNT INC PO BOX 170382 ATLANTA, GA 30317	N/A	NON-PROFIT	EDUCATIONAL	40,000
FOOD CONNECTS	N/A	NON-PROFIT	CHARITABLE	25,000

22 BROWNE COURT 110 BRATTLEBORO,VT 05301				
FRACTURED ATLAS 228 PARK AVE S STE 56651 NEW YORK,NY 10003	N/A	NON-PROFIT	PROMOTION OF THE ARTS	10,000
FRESH GRASS (OFFICE PERFORMING ARTS & FILM INC) 130 JANE STREET 5J NEW YORK,NY 10014	N/A	NON-PROFIT	PROMOTION OF THE ARTS	40,000
FRIENDS OF KIRBY LANE PARK 1825 W SARATOGA STREET BALTIMORE,MD 21223	N/A	NON-PROFIT	CHARITABLE	15,000
GENERATION CITIZEN 745 ATLANTIC AVENUE 2ND FL BOSTON,MA 02111	N/A	NON-PROFIT	EDUCATIONAL	45,000
GENERATION CITIZEN 745 ATLANTIC AVENUE 2ND FL BOSTON,MA 02111	N/A	NON-PROFIT	EDUCATIONAL	20,000
GREEN ROOTS INC 227 MARGINAL STREET STE 1 CHELSEA,MA 02150	N/A	NON-PROFIT	EDUCATIONAL	5,000
INTERNATIONAL SOCIETY OF PERFORMING ARTS 630 9TH AVENUE STE 213 NEW YORK,NY 10036	N/A	NON-PROFIT	PROMOTION OF THE ARTS	5,000
LAMBDA LEGAL DEFENCE & EDUCATION FUND 120 WALL STREET 19TH FLOOR NEW YORK,NY 10005	N/A	NON-PROFIT	EDUCATIONAL	5,000
LAND TRUST ALLIANCE NORTHEAST REGION 112 SPRING STREET STE 204 SARASOTA SPRINGS,NY 12866	N/A	NON-PROFIT	ENVIRONMENTAL	7,000
NEW GEORGIA PROJECT 830 GLENWOOD AVE SE STE 510- 221 ATLANTA,GA 30316	N/A	NON-PROFIT	EDUCATIONAL	50,000
NEXT STAGE ARTS PROJECT 15 KIMBALL HILL RD PUTNEY,VT 05346	N/A	NON-PROFIT	EDUCATIONAL	40,000
NH ALLIANCE FOR END OF LIFE OPTIONS 80 POST ROAD SUGAR HILL,NH 03586	N/A	NON-PROFIT	EDUCATIONAL	5,000
RIVER NETWORK PO BOX 21387 BOULDER,CO 80308	N/A	NON-PROFIT	ENVIRONMENTAL	35,000
ROCKEFELLER FAMILY FUND 475 RIVERSIDE DRIVE SUITE 900 NEW YORK,NY 10115	N/A	NON-PROFIT	EDUCATIONAL	75,000
SOUTHERN ENVIRONMENTAL LAW CENTER 201 WEST MAIN STREET STE 14 CHARLOTTESVILLE,V A 22902	N/A	NON-PROFIT	ENVIRONMENTAL	40,000
ST LAWRENCE UNIVERSITY 23 ROMODA DRIVE CANTON,NY 13617	N/A	NON-PROFIT	EDUCATIONAL	5,000

THE JAR 29 FAYETTE ST APT G2 BOSTON,MA 02119	N/A	NON-PROFIT	EDUCATIONAL	30,000
THOUSAND ISLANDS LAND TRUST 135 JOHN STREET CLAYTON,NY 13624	N/A	NON-PROFIT	ENVIRONMENTAL	10,000
UNION OF CONCERNED SCIENTISTS TWO BRATTLE SQUARE 6TH FL CAMBRIDGE,MA 02238	N/A	NON-PROFIT	SCIENTIFIC	40,000
UNION OF CONCERNED SCIENTISTS TWO BRATTLE SQUARE 6TH FL CAMBRIDGE,MA 02238	N/A	NON-PROFIT	SCIENTIFIC	25,000
UNION OF CONCERNED SCIENTISTS TWO BRATTLE SQUARE 6TH FL CAMBRIDGE,MA 02238	N/A	NON-PROFIT	SCIENTIFIC	75,000
WINDWARD FUND 1828 L STREET NW STE 300-C WASHINGTON,DC 20036	N/A	NON-PROFIT	CHARITABLE	10,000
WOMEN ENGAGED 1530 DEKALB AVE STE A ATLANTA,GA 30307	N/A	NON-PROFIT	PROMOTION OF SOCIAL JUSTICE	35,000
WOMEN ENGAGED 1530 DEKALB AVE STE A ATLANTA,GA 30307	N/A	NON-PROFIT	PROMOTION OF SOCIAL JUSTICE	30,000
YELLOW BARN INC PO BOX 507 PUTNEY,VT 05346	N/A	NON-PROFIT	PROMOTION OF THE ARTS	40,000
<b>Total</b> . . . . .			<b>3a</b>	<b>1,125,000</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

12 Subtotal. Add columns (b), (d), and (e)

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

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

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 categories and a total row.

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 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	14,545	14,545		0

**TY 2024 IRS 990 e-File Render**
**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ABBVIE INC 3.2% 11/21/29	5,423	4,781
ALEXANDRIA RE EQUITIES 4.9% 12/15/30	6,030	5,034
AMERICAN HONDA FIN CORP 4.95% 1/9/26	5,034	5,011
AMERICAN TOWER CORP 3.125% 1/15/27	5,383	4,901
AMGEN 2.2% 2/21/27	5,216	4,836
ANTHEM INC 4.101% 3/1/28	5,662	4,985
AON CORP 2.8% 5/15/30	5,506	4,632
ASTRAZENECA PLC 3.125% 6/12/27	4,818	4,915
AT&T 4.35% 3/1/29	5,017	5,010
BANK MONTREAL MED-TRM 2.65%	4,701	4,882
BANK OF AMERICA 1.898% 7/23/31	10,135	8,785
BANK OF NOVA SCOTIA 5.35% 12/7/26	6,161	6,084
BLACKROCK FDG 5.0% 3/14/34	6,028	6,131
BOSTON PPTYS LP 2.75% 10/1/26	4,806	4,889
CALVERT IMPACT CAPITAL 5.0% 6/15/29	25,000	22,967
CARRIER GLOBAL CORP 2.7% 2/15/31	4,287	4,547
CITIGROUP 2.572% 6/3/31	5,332	4,534
CITIGROUP 3.668% 7/24/28	4,951	4,921
CITIZENS FINL GRP 5.718% 7/23/32	6,122	6,204
COMCAST CORP 5.3% 6/1/34	6,302	6,146
CVS HEALTH CORP 5.0% 1/30/29	99,792	101,521
DEERE JOHN CAP CORP MED-TRM 4.75% 1/20/28	9,989	10,157
DTE ELECTRIC CO 2020 SER A 2.25% 3/1/30	6,115	6,387
ENBRIDGE INC 5.7% 3/8/33	4,214	4,147
EQUINIX INC 3.2% 11/18/29	5,295	4,745
EVERSOURCE ENERGY 1.65% 8/15/30	4,437	4,339
FIFTH THIRD BANCORP 6.361% 10/27/28	5,047	5,214
GE HEALTHCARE TECHNOLOGIES 4.8% 8/14/29	100,822	101,466
GOLDMAN SACHS GROUP 3.814% 4/23/29	4,690	4,916
HOME DEPOT 2.95% 6/15/29	10,042	9,568
INTERNATIONAL BUSINESS MACHINES 4.5% 2/6/28	99,859	100,883
INTERNATIONAL FIN CORP 0.75% 5/15/26	99,939	98,687
JPMORGAN CHASE 2.58% 4/22/32	10,059	8,927
KEURIG DR PEPPER INC 2.25% 3/15/31	4,262	4,413
LOCAL INITITATIVES SUPPORT CORP 0.95% 12/15/25	100,014	97,867
LOWES 4.5% 4/15/30	100,332	100,763
MERCK & CO 2.15% 12/10/31	8,371	8,725
MORGAN STANLEY 1.593% 5/4/27	4,936	4,878
NATIONAL RURAL UTILS COOP 1.35%	3,924	4,209
NATURE CONSERVANCY 2.768% 3/1/27	100,014	96,806
NEXTERA ENERGY 1.875% 1/15/27	4,769	4,821
NORTHERN TRUST CORP 6.125% 11/2/32	6,425	6,481
NORTHROP GRUMMAN 3.25% 1/15/28	4,830	4,884

Name of Bond	End of Year Book Value	End of Year Fair Market Value
OTIS WORLDWIDE CORP 5.125 11/19/31	101,724	102,974
PROGRESSIVE CORP OH 3.0% 3/15/32	4,635	4,557
PROLOGIS 5.0% 3/15/34	5,944	6,017
ROYAL BK CDA GLOBAL MED-TRM 6.0% 11/1/27	5,254	5,196
SEMPRA ENERGY 3.4% 2/1/28	5,452	4,881
T MOBILE USA INC 4.8% 7/15/28	99,803	101,340
THE CAMPBERLLS CO 4.15% 3/15/28	96,532	96,618
TRUIST FINANCIAL CORP 1.267%	9,301	9,776
UNITED PARCEL SERVICE 3.4% 3/15/29	5,367	4,876
UNITEDHEALTH GROUP 4.6% 4/15/27	4,965	5,029
VERIZON 1.5% 9/18/30	4,994	4,318
WORKDAY INC 3.5% 4/1/27	97,269	98,706

**TY 2024 IRS 990 e-File Render****Name:** FRESH SOUND FOUNDATION INC**EIN:** 06-1428363

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABORATORIES	41,457	122,409
ACCENTURE PLC IRELAND	29,394	51,110
ADOBE SYS	42,390	35,593
AIRBNB	20,278	19,851
ALCON	37,110	39,726
ALPHABET CLASS A	40,511	149,796
ALPHABET CLASS A	12,368	147,328
AMAZON	8,057	16,893
AMPHENOL CORP	25,323	123,438
ANALOG DEVICES	36,323	152,333
APPLE	25,818	41,444
APPLE	50,303	126,385
APTARGROUP INC	12,054	93,858
ARM HOLDINGS PLC	13,653	18,600
ASML HOLDINGS	26,404	35,261
BLACKSTONE GROUP INC	12,930	61,328
BLUEHUB LOAN FUND 2% 6/30/25	225,000	255,000
CARRIER GLOBAL CORP	54,053	146,380
CEI INC NTS 2% 9/30/27	225,000	225,000
CLIFFWATER CORPORATE LENDING FUND	180,594	181,769
CLOUDFLARE	24,045	68,541
COHEN & STEERS INSTL REALTY FUND	145,106	161,470
CONESTOGA SMALL-CAP INSTL	66,438	69,220
COOPER COS	44,285	37,003
COSTCO	17,272	112,853
CROWN HOLDINGS	45,338	56,639
DANAHER CORP	21,433	46,422
DANAHER CORP	29,910	24,693
DANONE EURO	21,624	22,390
GALLAGHER ARTHUR J & CO	27,297	71,387
GARMIN LTD	19,692	57,815
HOME DEPOT INC	33,909	38,497
ISHARES TIPS	357,272	368,194
JPMORGAN CHASE & CO	40,077	80,595
JPMORGAN EXCHANGE TRADED FUND	181,605	181,769
KLA CORP	39,255	105,697
LOREAL EURO	68,447	117,212
MARRIOTT INTL	15,382	29,233
MASTERCARD	22,578	168,582
MCCORMICK & CO	52,157	56,865
MERCK & CO.	29,750	42,192
MICROSOFT	50,771	174,094
MICROSOFT	17,314	83,067

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NEXTERA ENERGY	26,894	48,108
NOVO NORDISK	43,188	87,655
NOVO NORDISK	28,382	21,741
NOVONESIS (NOVOZYMES)	10,616	135,748
NVIDIA	26,868	33,178
OTIS WORLDWIDE CORP	12,581	12,873
PEPSICO	40,886	55,325
PROLOGIS	38,800	32,797
REGENCY CENTERS CORP	41,137	46,584
RELX PLC	31,858	38,038
ROCKWELL AUTOMATION	38,849	132,868
S&P GLOBAL	25,023	31,637
SALESFORCE	14,317	13,635
SCHNEIDER ELECTRIC	51,083	76,866
SHERWIN-WILLIAMS	22,564	34,679
STONE RIDGE HIGH YLD REINSURANCE	185,720	175,361
SUNWEALTH LOAN COMPANY	25,000	25,000
T-MOBILE	44,389	89,348
TOMRA SYSTEMS	25,442	108,600
UBER TECHNOLOGIES	13,122	16,328
UL SOLUTIONS	17,871	25,501
ULTRA BEAUTY	27,852	34,619
UNION PACIFIC	20,905	43,485
UNITED RENTALS	23,481	70,820
VERALTO CORP	24,307	30,285
VERMONT COMMUNITY LOAN FUND	75,000	75,000
VERTEX PHARMACEUTICALS	16,364	15,582
VISA	28,584	109,710
WASTE MANAGEMENT INC	24,923	66,587
XYLEM INC.	32,458	129,360
ZOETIS INC	45,317	38,520

## TY 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

**US Government Securities - End of  
Year Book Value:**

1,837,094

**US Government Securities - End of  
Year Fair Market Value:**

1,864,267

**State & Local Government  
Securities - End of Year Book  
Value:**

102,907

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

104,918

## TY 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
FOUNDERS FIRST CHANGE CATALYST	AT COST	154,012	154,012
MARLETTE FUNDING	AT COST	37,700	37,700
SUN INITIATIVE FINANCING	AT COST	50,000	50,000

# TY 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Description	Amount
NET ASSET ADJUSTMENT	21,439

# TY 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	499	499		0
PHILANTHROPIC ADVISORY	96,295	0		96,295
SOFTWARE & WEB SERVICES	3,504	0		3,504

# TY 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	95	95	

# TY 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	96,896	96,896		0

# TY 2024 IRS 990 e-File Render

**Name:** FRESH SOUND FOUNDATION INC

**EIN:** 06-1428363

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	2,509	2,509		0
FEDERAL EXCISE	12,000	0		0