

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

Department of the Treasury
Internal Revenue Service

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Open to Public Inspection

For calendar year 2020 or tax year beginning , and ending

Name of foundation The Stone Foundation of New Jersey		A Employer identification number 13-3947516
Number and street (or P.O. box number if mail is not delivered to street address) P.O. Box 117	Room/suite	B Telephone number (see instructions) 732-758-8204
City or town, state or province, country, and ZIP or foreign postal code Leonardo NJ 07737		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) \$ 10,085,441	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis.)	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 (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule) ...	731,199			
	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	107,466	107,466		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	10,214			
	b Gross sales price for all assets on line 6a 302,937				
	7 Capital gain net income (from Part IV, line 2)		10,214		
	8 Net short-term capital gain			0	
	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	848,879	117,680	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) Stmt 1	4,800	4,800		
	c Other professional fees (attach schedule) Stmt 2	37,246	37,246		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) Stmt 3	1,531	845		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch.) Stmt 4	10,954	10,954		
	24 Total operating and administrative expenses. Add lines 13 through 23	54,531	53,845	0	0
	25 Contributions, gifts, grants paid	866,100			866,100
26 Total expenses and disbursements. Add lines 24 and 25	920,631	53,845	0	866,100	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-71,752				
b Net investment income (if negative, enter -0-)		63,835			
c Adjusted net income (if negative, enter -0-)			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	1,213,612	809,042	809,042		
	2	Savings and temporary cash investments					
	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 (att. schedule)					
		Less: allowance for doubtful accounts	0				
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments – U.S. and state government obligations (attach schedule) Stmt 5	3,236,906	499,893	499,945		
	b	Investments – corporate stock (attach schedule) See Stmt 6	1,466,285	1,359,976	3,309,072		
	c	Investments – corporate bonds (attach schedule)					
	11	Investments – land, buildings, and equipment: basis					
	Less: accumulated depreciation (attach sch.)						
12	Investments – mortgage loans						
13	Investments – other (attach schedule) See Statement 7	1,136,811	4,311,038	5,465,469			
14	Land, buildings, and equipment: basis						
	Less: accumulated depreciation (attach sch.)						
15	Other assets (describe See Statement 8)		1,913	1,913			
16	Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	7,053,614	6,981,862	10,085,441			
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 and complete lines 24, 25, 29, and 30. <input checked="" type="checkbox"/>						
	24	Net assets without donor restrictions	7,053,614	6,981,862			
	25	Net assets with donor restrictions					
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <input type="checkbox"/>						
	26	Capital stock, trust principal, or current funds					
	27	Paid-in or capital surplus, or land, bldg., and equipment fund					
	28	Retained earnings, accumulated income, endowment, or other funds					
29	Total net assets or fund balances (see instructions)	7,053,614	6,981,862				
30	Total liabilities and net assets/fund balances (see instructions)	7,053,614	6,981,862				

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 7,053,614
2	Enter amount from Part I, line 27a	2 -71,752
3	Other increases not included in line 2 (itemize)	3
4	Add lines 1, 2, and 3	4 6,981,862
5	Decreases not included in line 2 (itemize)	5
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6 6,981,862

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Worksheet			
b			
c			
d			
e			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e			
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			
2 Capital gain net income or (net capital loss) If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	10,214	
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	-31,292	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 – DO NOT COMPLETE.

1 Reserved

(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
Reserved			
Reserved			
Reserved			
Reserved			
Reserved			
2 Reserved			2
3 Reserved			3
4 Reserved			4
5 Reserved			5
6 Reserved			6
7 Reserved			7
8 Reserved			8

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)		
b	Reserved	1	887
c	All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0
3	Add lines 1 and 2	3	887
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	887
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	2,800
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	2,800
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,913
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 1,913 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		N/A
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10	X	

Part VII-A Statements Regarding Activities (continued)

		Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>www.stonefdnnj.org</u>	X	
14	The books are in care of <u>Julia Nagy</u> Telephone no. <u>732-758-8204</u> <u>P.O. Box 117</u> Located at <u>Leonardo</u> NJ ZIP+4 <u>07737</u>		
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		
16	At any time during calendar year 2020, 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		X

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

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

		Yes	No
1a	During the year, did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here		N/A
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020?		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2020, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2020? If "Yes," list the years 20 , 20 , 20 , 20 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)		N/A
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2020 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 2020.)		N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?		X

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

		Yes	No
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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
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	N/A	
	Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
c	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?	N/A	
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

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

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

(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
See Statement 10				

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 VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	7,817,561
b	Average of monthly cash balances	1b	750,866
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	8,568,427
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	8,568,427
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	128,526
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,439,901
6	Minimum investment return. Enter 5% of line 5	6	421,995

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	421,995
2a	Tax on investment income for 2020 from Part VI, line 5	2a	887
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	887
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	421,108
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	421,108
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	421,108

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	866,100
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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 V, line 8; and Part XIII, line 4	4	866,100
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	866,100

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				421,108
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015		167,997		
b From 2016		155,821		
c From 2017		152,329		
d From 2018				
e From 2019		32,917		
f Total of lines 3a through e	509,064			
4 Qualifying distributions for 2020 from Part XII, line 4: \$ 866,100				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2020 distributable amount				421,108
e Remaining amount distributed out of corpus	444,992			
5 Excess distributions carryover applied to 2020 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	954,056			
b Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b. Taxable amount – see instructions				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount – see instructions				
f Undistributed income for 2020. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2021				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)				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)	167,997			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	786,059			
10 Analysis of line 9:				
a Excess from 2016		155,821		
b Excess from 2017		152,329		
c Excess from 2018				
d Excess from 2019		32,917		
e Excess from 2020		444,992		

Part XIV Private Operating Foundations (see instructions and Part VII-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 2020, enter the date of the ruling _____

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

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	Prior 3 years			(e) Total
	(a) 2020	(b) 2019	(c) 2018	(d) 2017	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test – enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c "Support" alternative test – enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
 Caroline P. Huber

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
 N/A

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed:
 Samuel G. Huber 732-758-8204
 P.O. Box 117 Leonardo NJ 07737

b The form in which applications should be submitted and information and materials they should include:
 See Statement 11

c Any submission deadlines:
 See Statement 12

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
 See Statement 13

Part XV 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 Paid during the year 180, Turning Lives Around 1 Bethany Rd. Bld3 Ste. 4 Hazlet NJ 07730	None	Amanda's Easel/Family	Justice	25,000
Association of NJ Env. Commissions P.O. Box 157 Mendham NJ 07945	None	General Operating	Support	10,000
Big Brothers, Big Sisters of 305 Bond St, 2nd Floor Asbury Park NJ 07712	None	One to One	Mentoring	15,000
Brookdale Comm College Foundation 765 Newman Springs Road Lincroft NJ 07738	None	Critical Needs Fund	Covid19	50,000
Brookdale Comm College Foundation 765 Newman Springs Road Lincroft NJ 07738	None	General Operating	Support	20,000
Cobscook Community Learning Center 10 Commissary Point Road Trescott ME 04652	None	Cobscook	Experimental Programs	25,000
CPC Behavioral Healthcare, Inc 10 Industrial Way East Eatontown NJ 07724-3317	None	Trans. & Treatment	Adolescent Girls	25,000
Princeton Area Community PO Box 825454 Philadelphia PA 19182	None		NJ Arts Fund	25,000
Family and Children's Service, Inc 191 Bath Avenue Long Branch NJ 07740	None	Certified	Dementia Practitioner	5,000
Family and Children's Service, Inc. 191 Bath Avenue Long Branch NJ 07740	None	Critical Needs Fund	Covid19	50,000
Total			3a	866,100
b Approved for future payment N/A				
Total			3b	

Part XV 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> Frenchman's Bay Conservancy P.O. Box 150 Hancock ME 04640	None		Day Ridges Nature Trail & Paddlers	15,000
Greater Newark Conservancy 32 Prince Street Newark NJ 07103	None		General Operating Support	25,000
HABcore Inc. P.O. Box 2361 Red Bank NJ 07701	None		Indep. Pathways Program Families	25,000
HABcore Inc. P.O. Box 2361 Red Bank NJ 07701	None		Critical Needs Fund-Covid19	50,000
Interfaith Neighbors 810 Fourth Avenue Asbury Park NJ 07712	None		Interfaith Neighbors' SOAR Program	25,000
Interfaith Neighbors 810 Fourth Avenue Asbury Park NJ 07712	None		Critical Needs Fund-Covid19	50,000
Henry D. Moore Parish House & Libra P.O. Box 127 Steuben ME 04680	None		General Operating Support	5,000
The Land Conservancy of New Jersey 19 Boonton Avenue Boonton NJ 07005	None		General Operating Support	12,000
Lunch Break, Inc. 121 Drs. James Parker Blv Red Bank NJ 07701	None		General Operating Support	20,000
Lunch Break, Inc. 121 Drs. James Parker Blv Red Bank NJ 07701	None		Critical Needs Fund-Covid-19	50,000
Total			3a	
b <i>Approved for future payment</i> N/A				
Total			3b	

Part XV 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> New Jersey Audubon 11 Hardscrabble Road Bernardsville NJ 07924	None		Birdwatching	10,000
New Jersey Conservation Foundation 170 Longview Road Far Hills NJ 07931	None		Energy Infrastructure Campaign	30,000
New Jersey Repertory Company 179 Broadway Long Branch NJ 07740	None		Main Stage Series of Six World Prem.	25,000
Partners for Women and Justice 60 S. Fullerton Ave, #211 Montclair NJ 07042	None		General Operating Support	20,000
Schoodic Arts For All 427 Main Street Winter Harbor ME 04693	None		Kids Art Club	10,000
Sharron Miller's Academy 14 South Park Street Montclair NJ 07042	None		General Operating Support	25,000
Springpoint Senior Living, Inc 4814 Outlook Dr. Ste 201 Wall Township NJ 07753	None		Health Eating Cooking Program	6,600
Two River Theater Company 21 Bridge Avenue Red Bank NJ 07701	None		Two River Theater's Education Pro	25,000
Wabanaki Cultural Preservation 18 Nebiskwit Drive Passadumkeag ME 04475	None		General Operating Support	5,000
The Bowery Mission 90 Lafayette St 6th fl New York NY 10013	None		General Operating Support	50,000
Total			3a	
b <i>Approved for future payment</i> N/A				
Total			3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> Maine Seacoast Mission 17 West Street Bar Harbor ME 04609	None	Critical Needs Fund	Covid19	50,000
Parker Family Health Center Inc. 211 Shrewsbury Avenue Red Bank NJ 07701	None	Enhanced	Diabetes Management	15,000
Parker Family Health Center Inc. 211 Shrewsbury Avenue Red Bank NJ 07701	None	Critical Needs Fund	Covid19	50,000
Shore Clubhouse Inc 266 Broadway Long Branch NJ 07740	None	General Operating	Support	7,500
Monmouth Conservation Foundation PO Box 4150 Middletown NJ 07748	None	General Operating	Support	10,000
Total			3a	
b <i>Approved for future payment</i> N/A				
Total			3b	

Capital Gains and Losses for Tax on Investment Income

Form **990-PF**

2020

For calendar year 2020, or tax year beginning

, and ending

Name

Employer Identification Number

The Stone Foundation of New Jersey

13-3947516

(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) CISCO SYS	P	12/20/18	09/10/20
(2) CISCO SYS	P	02/06/18	09/10/20
(3) GRAHAM HLD	P	10/22/19	04/22/20
(4) GRAHAM HLD	P	11/03/16	04/22/20
(5) GRAHAM HLD	P	08/30/16	04/17/20
(6) FEDEX	P	08/05/19	05/05/20
(7) FED EX	P	08/02/19	05/05/20
(8) BP PRUDHOE	D	03/09/20	03/10/20
(9) OCEANFIRST	P	12/20/18	08/13/20
(10) OCEANFIRST	P	02/28/18	08/13/20
(11) OCEANFIRST	P	02/05/18	08/13/20
(12) OCEANFIRST	P	08/10/17	08/13/20
(13) SOLAREEDGE	P	03/28/17	08/17/20
(14) Short Term			
(15) Long Term			

(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)
(1) 11,968		12,742	-774
(2) 39,894		38,795	1,099
(3) 12,004		22,965	-10,961
(4) 5,145		6,692	-1,547
(5) 17,002		24,608	-7,606
(6) 23,775		31,104	-7,329
(7) 35,663		48,665	-13,002
(8) 31,199		31,199	
(9) 17,181		22,318	-5,137
(10) 8,591		12,980	-4,389
(11) 4,295		6,507	-2,212
(12) 21,476		32,604	-11,128
(13) 22,287		1,544	20,743
(14) 23,720			23,720
(15) 28,737			28,737

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))
(1)			-774
(2)			1,099
(3)			-10,961
(4)			-1,547
(5)			-7,606
(6)			-7,329
(7)			-13,002
(8)			
(9)			-5,137
(10)			-4,389
(11)			-2,212
(12)			-11,128
(13)			20,743
(14)			23,720
(15)			28,737

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Accountant	\$ 4,800	\$ 4,800	\$	\$
Total	<u>\$ 4,800</u>	<u>\$ 4,800</u>	<u>\$ 0</u>	<u>\$ 0</u>

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Investment Fees	\$ 37,246	\$ 37,246	\$	\$
Total	<u>\$ 37,246</u>	<u>\$ 37,246</u>	<u>\$ 0</u>	<u>\$ 0</u>

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Foreign Withholding Tax	\$ 845	\$ 845	\$	\$
Federal Excise Tax	686			
Total	<u>\$ 1,531</u>	<u>\$ 845</u>	<u>\$ 0</u>	<u>\$ 0</u>

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses	\$	\$	\$	\$
Filing Fees	760	760		
Administrator	10,000	10,000		
Postage	194	194		
Total	<u>\$ 10,954</u>	<u>\$ 10,954</u>	<u>\$ 0</u>	<u>\$ 0</u>

Federal Statements

Statement 5 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
U.S. Treasury Bill	\$ 746,512	\$ 499,893	Cost	\$ 499,945
U.S. Treasury Bill	2,490,394		Cost	
U.S. Treasury Bill			Cost	
Total	<u>\$ 3,236,906</u>	<u>\$ 499,893</u>		<u>\$ 499,945</u>

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Accenture	\$ 52,759	\$ 52,759	Cost	\$ 91,424
Pentair PLC	79,492	79,492	Cost	106,180
Alphabet Inc	155,739	155,739	Cost	350,376
American Express		73,012	Cost	96,728
Apple Inc	193,079	193,079	Cost	849,216
Cable One	24,294	24,294	Cost	77,970
Cisco	51,537		Cost	
Danone Sponsored	47,453	63,590	Cost	52,624
Walt Disney	45,659	56,262	Cost	90,590
Elanco Animal		31,140	Cost	30,670
Federal Express	79,770		Cost	
Graham Holdings	85,646	31,381	Cost	26,669
Hain Celestial	86,887	86,887	Cost	120,450
Intel Corp	116,843	116,843	Cost	184,334
Mastercard	45,287	45,287	Cost	142,776
Microsoft	114,749	114,749	Cost	572,732
Oceanfirst Finl	74,409		Cost	
Schneider Electric	26,524	26,524	Cost	57,898
Solaredge Technologies	7,722	6,177	Cost	127,648
Starbucks Corp	70,411	70,411	Cost	133,725
Unilever PLC	67,332	91,657	Cost	120,720
Xylem Inc	40,693	40,693	Cost	76,342
Total	<u>\$ 1,466,285</u>	<u>\$ 1,359,976</u>		<u>\$ 3,309,072</u>

Federal Statements**Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
Mutual Funds	\$ 1,136,811	\$ 4,240,264	Cost	\$ 5,324,269
Exchange Traded Funds		70,774	Cost	141,200
Total	<u>\$ 1,136,811</u>	<u>\$ 4,311,038</u>		<u>\$ 5,465,469</u>

Statement 8 - Form 990-PF, Part II, Line 15 - Other Assets

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Fair Market Value</u>
Prepaid Taxes	\$ <u> </u>	\$ <u> 1,913</u>	\$ <u> 1,913</u>
Total	\$ <u> 0</u>	\$ <u> 1,913</u>	\$ <u> 1,913</u>

Federal Statements

Statement 9 - Form 990-PF, Part VII-A, Line 10 - Substantial Contributors

<u>Name</u>	<u>Address</u>	<u>City, State, Zip</u>
Caroline P. Huber	PO Box 17	Leonardo NJ 07737

Statement 10 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

<u>Name and Address</u>	<u>Title</u>	<u>Average Hours</u>	<u>Compensation</u>	<u>Benefits</u>	<u>Expenses</u>
Caroline P. Huber P.O. Box 117 Leonardo NJ 07737	Director	1.00	0	0	0
Samuel G. Huber P.O. Box 117 Leonardo NJ 07737	President	1.00	0	0	0
Joseph W. Huber P.O. Box 117 Leonardo NJ 07737	V. Pres & Se	1.00	0	0	0
Martha C Huber P.O. Box 117 Leonardo NJ 07737	Treasurer	1.00	0	0	0
Eleanor H. Huber P.O. Box 117 Leonardo NJ 07737	Director	1.00	0	0	0
Lucy. C. Huber P.O. Box 117 Leonardo NJ 07737	Director	1.00	0	0	0
Howard P. Aronson P.O. Box 117 Leonardo NJ 07737	Director	1.00	0	0	0

Statement 11 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**Description**

The Stone Foundation of New Jersey supports 501(c)(3) organizations, primarily within New Jersey and with a particular focus in the Two Rivers area of Monmouth County, that promote improvement of the social, environmental, educational, and artistic community. The Foundation accepts grant requests online at the Foundation's website www.stonefdnnj.org. All organizations will be required to complete an inquiry and Statement of Intent form in the application section of the Foundation's website. Organizations previously supported by the Foundation will need to complete the process as a new organization in order to complete the required data entry. The Foundation will divide grant-making into two cycles. Applications for grants to organizations with fiscal years ending in June will be due on February 1st and applications for grants to organizations with fiscal years ending in December will be due on September 1st. All inquiries and Statements of Intent must be submitted through the grant application portal before December 1st for the February cycle, and before July 1st for the September cycle.

Statement 12 - Form 990-PF, Part XV, Line 2c - Submission Deadlines**Description**

Applications for grants to organizations with fiscal years ending in June will be due on February 1st, and organizations with fiscal years ending in December will be due on September 1st.

Statement 13 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**Description**

Grants typically range from \$5,000 to \$25,000 and are for a one year period. For those organizations awarded grants, The Stone Foundation of New Jersey may wish to make a site visit or meet with project personnel from time to time.

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

Name of the organization

Employer identification number

The Stone Foundation of New Jersey

13-3947516

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)() (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ► \$

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

Name of organization

The Stone Foundation of New Jersey

Employer identification number

13-3947516

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Caroline P. Huber P.O. Box 117 Leonardo NJ 07737	\$ 731,199	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization The Stone Foundation of New Jersey	Employer identification number 13-3947516
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Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
1	FIDELITY STOCK	\$ 31,199	03/09/20
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Taxable Dividends from Securities

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>US Obs (\$ or %)</u>
Dividends	\$ 88,372		14		
Interest	19,094		14		
Total	<u>\$ 107,466</u>				