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

OMB No 1545-0052 2008

Depart	ment o	f the Treasury	rreate	eu as a Private r	ouridation	1		2000
Interna	l Rever	nue Service Note. The foundation r	may be able	to use a copy of this re	um to satisfy st	ate reporting	requirements	<u> </u>
For c	alenda	ar year 2008, or tax year beginning		and ending				
G CH	neck a	Il that apply Initial return	Final retur	rn X Amen	ded return	T	Address change	Name change
la	the IRS	WILLIAM A. MARQUARD F	TAMIL	Y		26	loyer identification num -1273210	
	rwise rınt	Number and street (or P O box number if mail is			Room/suite	85	phone number (see page 1 9-261-6800	·
	type.	111 WOODLAND AVENUE,	UNIT	107		1	emption application is pend	. —
	pecifi	only or torm, orato, and an ever	4.0			D 1 F	oreign organizations, chec	k here
	uctions		KY 40			7	oreign organizations meet	. \square
		ype of organization X Section 501(c)(3) exer					5% test, check here and a	
				le private foundation	_ 	- ·	/ate foundation status was r section 507(b)(1)(A), che	
		ket value of all assets at end J Accounting		X Cash A	crual	1		_
		1 7 500	(specify)			I .	foundation is in a 60-mon r section 507(b)(1)(B), che	
	<u>= 16)</u>					unde	Section 507(b)(1)(b), the	
Pa	rt l	Analysis of Revenue and Expense		(a) Revenue and expenses per	(b) Net in	vestment	(c) Adjusted net	(d) Disbursements for charitable
		total of amounts in columns (b), (c), and (d) may not in		books	1 ' '	ome	income	purposes
		equal the amounts in column (a) (see pg 11 of the in		100,00	0			(cash basis only)
	1	Contributions, gifts, grants, etc., received (attach sche-	-	100,00	4			
	2	Check Inf the foundation is not required to attack			-			
Į	3	Interest on savings and temporary cash investigations and interest from securities	ments		+			
	4				 			
	5a	Gross rents			 			
e l	b	Net rental income or (loss) Net gain or (loss) from sale of assets not on line 10			-			
en en	6a b	Gross sales price for all assets on line 6a			1			
Revenue		Capital gain net income (from Part IV, line 2)				0		
ř	7 : 8	Net short-term capital gain			+	<u>-</u>	0	
⊇	9	Income modifications		····				
M107	10a	Gross sales less returns & allowances						
⇒	b	Less: Cost of goods sold						
1 5%	C	Gross profit or (loss) (attach schedule)						
	11	Other income (attach schedule)						
JUL	12	Total. Add lines 1 through 11		100,00	0	0	0	
	13	Compensation of officers, directors, trustees, e	etc					
NNED	14	Other employee salaries and wages						
Zu	15	Pension plans, employee benefits					FDECEN	IED
KX	16a	Legal fees (attach schedule)					RECEN	
	b	Accounting fees (attach schedule)			<u> </u>		R IIIN 07	(R)
SCA and Administrative Exp	С	Other professional fees (attach schedule)						2010
tra	17	Interest					1	<u> </u>
ıis	18	Taxes (attach schedule) (see page 14 of the instructions)					OGDEN	
Ē	19	Depreciation (attach schedule) and depletion					I UDULI	e Property
₽d	20	Occupancy		<u></u>			<u>-</u>	
פ	21	Travel, conferences, and meetings				 		
a	22	Printing and publications			_			
ng	23		it 1	20	ช	208		
ati	24	Total operating and administrative expenses	s.			^^^		_
Operating		Add lines 13 through 23		20		208		30,000
ŏ	25	Contributions, gifts, grants paid		20,00				20,000
26 Total expenses and disbursements. Add lines 24 and				20,20	8	208	0	20,000
	27	Subtract line 26 from line 12		70 70	2			
	a	Excess of revenue over expenses & disburs		79,79		0		
	b	Net investment income (if negative, enter -0-))		+		0	
	<u> </u>	Adjusted net income (if negative, enter -0-)		1	<u> </u>		1 0	5 990-PF (2009)

Fo	m 990	PF (2008) WILLIAM A. MARQUARD FAMILY	26-12732	10	Page 2
_		An I I I I I I I I I I I I I I I I I I I	Beginning of year	End of	
	Part I	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
П	1	Cash—non-interest-bearing	(2)	79,792	79,792
	2	Savings and temporary cash investments			
	3	Accounts receivable			
ı	J	Less. allowance for doubtful accounts	İ		
	4	Pledges receivable			
	4		1		
	_	Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see page 15 of the			
		instructions)			
	7	Other notes and toans receivable (att schedule)			
		Less. allowance for doubtful accounts ▶			
ş	8	Inventories for sale or use	_		
Assets	9	Prepaid expenses and deferred charges			
۲	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	С	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)			
	14	Land, buildings, and equipment basis			
- 1	1-7	Less accumulated depreciation (attach sch.)	İ		
	15	Other assets (describe)			
	16	Total assets (to be completed by all filers—see the	o	79,792	79,792
\dashv		instructions. Also, see page 1, item I)	-	19,132	13,132
	17	Accounts payable and accrued expenses			
S	18	Grants payable .			
Liabilities	19	Deferred revenue			
豆	20	Loans from officers, directors, trustees, and other disqualified persons			
<u>.e</u> l	21	Mortgages and other notes payable (attach schedule)			
7	22	Other liabilities (describe ▶)			
\perp	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here 🕨 🗵			
es		and complete lines 24 through 26 and lines 30 and 31.		1	
Net Assets or Fund Balances	24	Unrestricted		79,792	
ᇛ	25	Temporanly restricted			
ä	26	Permanently restricted			
힏		Foundations that do not follow SFAS 117, check here			
Ξ		and complete lines 27 through 31.	i		
닐	27	Capital stock, trust principal, or current funds			
S	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
šet	29	Retained earnings, accumulated income, endowment, or other funds			
Si	30	Total net assets or fund balances (see page 17 of the		·	
1		instructions)	l ol	79,792	
Z	31	Total liabilities and net assets/fund balances (see page 17			
	31	of the instructions)	lol	79,792	
لـــ	Part I			,,,,,,,,	
		net assets or fund balances at beginning of year—Part II, column (a), line 30 (mu	st agree with		
1		net assets or furth balances at beginning of year—Part II, column (a), line 30 (mu: of-year figure reported on pnor year's return)	or agree with	1	
_		•		2	79,792
		r amount from Part I, line 27a	•	3	.5,152
		r increases not included in line 2 (itemize)▶			79,792
		ines 1, 2, and 3		. 4	
		eases not included in line 2 (itemize)		. 5	79,792
_6	otal	net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (I	D), line 30	6	Form 990-PF (2008)

26-1273210

 $\mathbf{x} = \mathbf{x} = -\mathbf{1} = -\mathbf{y} = -\mathbf{y} = -\mathbf{y}$

Form 990-PF (2008) WILL:	IAM A.	MARQUARD FAMILY		26-1273210	<u> </u>	Page 3
Part IV Capital Gair	ns and Los	ses for Tax on Investme	nt Income			
		d(s) of property sold (e g , real estate, r 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 N/A						
b						
С						
d		·				
е		 				
(e) Gross sales price		(f) Depreciation allowed (or allowable)		r other basis ense of sale		n or (loss)) minus (g)
a						
b						
С						
d						
е					,	
Complete only for assets sh	owing gain in	column (h) and owned by the for	undation on 12/31/6	59	(I) Gains (Co	ol (h) gain minus
(ı) FMV as of 12/31/69		(j) Adjusted basis as of 12/31/69	• •	ss of col (i) (j), if any		less than -0-) or
a						
b						
С						
d						
е						· · · · · · · · · · · · · · · · · · ·
2 Capital gain net income or (net capital los	s) If gain, also enter in F	•		2	
3 Net short-term capital gain of	or (loss) as de	fined in sections 1222(5) and (6)	_			
	, ,	(c) (see pages 13 and 17 of the				
If (loss), enter -0- in Part I, I		(c) (see pages to and the and			3	
		ection 4940(e) for Reduce	ed Tax on Net	Investment Inco		
		ions subject to the section 4940(
			a) tax on not invoc	mont moonto ,		
If section 4940(d)(2) applies, lea	ave this part b	lank				N/A
Was the foundation liable for the	e section 4942	2 tax on the distributable amount	of any year in the b	pase period? TY	es 🗌 No	M/ A
		r section 4940(e) Do not comple				
···		umn for each year; see page 18		oforo making any or	atrice.	
(a)	nt in each con	(b)	or the instructions t	(c)	itiles	(d)
Base period years		Adjusted qualifying distributions	s Net value	of nonchantable-use as		bution ratio
Calendar year (or tax year beg	ginning in)				(coi (b) ai	ivided by col (c))
2007		· · · · · · · · · · · · · · · · · · ·				
2006						
2005						
2004						
2003						
O Takal at has 4 and one 7.0						
2 Total of line 1, column (d)				•	2	
<u> </u>	-	ase penod—divide the total on lir				
number of years the founda	tion has been	in existence if less than 5 years			3	
			_			
4 Enter the net value of nonch	nantable-use a	assets for 2008 from Part X, line	5		4	
5 Multiply line 4 by line 3				•	5	
6 Enter 1% of net investment	income (1% c	of Part I, line 27b)			6	
7 Add lines 5 and 6					7	
8 Enter qualifying distributions				-	8	
If line 8 is equal to or greate	r than line 7,	check the box in Part VI, line 1b,	and complete that	part using a 1% tax r	rate See	
the Part VI instructions on p	age 18					

b Domestic foundations that meet the section 4940(here ▶ and enter 1% of Part I, line 27b c All other domestic foundations enter 2% of line 27b of Part I, line 12, col. (b) 2 Tax under section 511 (domestic section 4947(a)() 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)() 5 Tax based on investment income. Subtract line 4 6 Credits/Payments a 2008 estimated tax payments and 2007 overpaym b Exempt foreign organizations—tax withheld at sou c Tax paid with application for extension of time to fill Backup withholding erroneously withheld 7 Total credits and payments Add lines 6a through 6 8 Enter any penalty for underpayment of estimated 6 9 Tax due. If the total of lines 5 and 8 is more than in 0 Overpayment. If line 7 is more than the total of line 11 Enter the amount of line 10 to be Credited to 200 Part VII-A Statements Regarding Ac 1a During the tax year, did the foundation attempt to 1 participate or intervene in any political campaign? b Did it spend more than \$100 during the year (either of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed published or distributed by the foundation in connect Did the foundation file Form 1120-POL for this year definition managers \$ 2 Enter the reimbursement (if any) paid by the foundation managers \$ 3 Has the foundation engaged in any activities that In if "Yes," attach a detailed description of the activition and the foundation made any changes, not previous incorporation, or bylaws, or other similar instrument Did the foundation have unrelated business gross bid if "Yes," has it filed a tax return on Form 990-T for 5 Was there a liquidation, termination, dissolution, or substar if "Yes," attach the statement required by General Instruction By language in the governing instrument, or By state legislation that effectively amends the gronflict with the state law remain in the governing to the foundation have at least \$5,000 in assets at the foundation have at least \$5,000 in assets at the foundation have at leas	y of ruling letter if necessary requirements in Part V, check Exempt foreign organizations trusts and taxable foundations trusts and taxable foundations on line 3. If zero or less, enter the credited to 2008 e. (Form 8868) x. Check here ☐ if Form 222 e. 7, enter amount owed to 5 and 8, enter the amount owestimated tax ▶ vities.	and enter "N/A" of y—see instruction of k senter 4% as only Others enter of the ser -0- 6a 6b 6c 6d 20 is attached everpaid local legislation or the ser purposes (see possible see page 1)	Refunded did it		1 2 3 4 5 5 7 8 9 10 11	Jetions		Yes	
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b Domestic foundations that meet the section 4940(here ▶ ☐ and enter 1% of Part I, line 27b c All other domestic foundations enter 2% of line 27b of Part I, line 12, col. (b) 2 Tax under section 511 (domestic section 4947(a)() 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)() 5 Tax based on investment income. Subtract line 4 6 Credits/Payments a 2008 estimated tax payments and 2007 overpaym b Exempt foreign organizations—tax withheld at sou c Tax paid with application for extension of time to fil d Backup withholding erroneously withheld 7 Total credits and payments Add lines 6a through 6 8 Enter any penalty for underpayment of estimated 6 9 Tax due. If the total of lines 5 and 8 is more than lil 10 Overpayment. If line 7 is more than the total of line 11 Enter the amount of line 10 to be Credited to 200 Part VII-A Statements Regarding Ac 1a During the tax year, did the foundation attempt to 1 participate or intervene in any political campaign? b Did it spend more than \$100 during the year (either of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed published or distributed by the foundation in connec c Did the foundation file Form 1120-POL for this year d Enter the amount (if any) of tax on political expend (1) On the foundation P\$ e Enter the reimbursement (if any) paid by the found foundation managers ▶ \$ 2 Has the foundation made any changes, not previous incorporation, or bylaws, or other similar instrumer 4a Did the foundation have unrelated business gross b If "Yes," attach a detailed description of the activity if "Yes," has it filed a tax return on Form 990-T for 5 Was there a liquidation, termination, dissolution, or substar if "Yes," has it filed a tax return on Form 990-T for by language in the governing instrument, or by language in the governing instrument, or By state legislation that effectively amends the g conflict with the state law remain in the governing to	Exempt foreign organizations trusts and taxable foundations trusts and taxable foundations trusts and taxable foundations from line 3. If zero or less, ente tredited to 2008 (Form 8868) Exempt foreign organizations trusts and taxable foundations from line 3. If zero or less, ente tredited to 2008 (Form 8868) Exempt foreign organizations trusts and taxable foundations to trusts and taxable	s enter 4% s enter 4% s enter 4% s only Others enter s only Others enter ser -0- 6a 6b 6c 6d 20 is attached everpaid local legislation or cal purposes (see possible)	Refunded did it	*	2 3 4 5 7 8 9			Yes	
here ▶ □ and enter 1% of Part I, line 27b c All other domestic foundations enter 2% of line 27i of Part I, line 12, col. (b) 2 Tax under section 511 (domestic section 4947(a)(*) 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(*) 5 Tax based on investment income. Subtract line 4 6 Credits/Payments a 2008 estimated tax payments and 2007 overpaym b Exempt foreign organizations—tax withheld at sou c Tax paid with application for extension of time to fid Backup withholding erroneously withheld 7 Total credits and payments Add lines 6a through (*) 8 Enter any penalty for underpayment of estimated (*) 7 Tax due. If the total of lines 5 and 8 is more than lid 9 Tax due. If the total of lines 5 and 8 is more than lid 10 Overpayment. If line 7 is more than the total of line 11 Enter the amount of line 10 to be Credited to 200 Part VII-A Statements Regarding Acd 1a During the tax year, did the foundation attempt to it participate or intervene in any political campaign? b Did it spend more than \$100 during the year (either of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed published or distributed by the foundation in connect Did the foundation file Form 1120-POL for this year definition in the foundation managers \$\infty\$ \$\infty\$ Enter the amount (if any) of tax on political expend (1) On the foundation engaged in any activities that he fill "Yes," attach a detailed description of the activities that he foundation made any changes, not previous incorporation, or bylaws, or other similar instrument. 4a Did the foundation have unrelated business gross if "Yes," has it filed a tax return on Form 990-T for Was there a liquidation, termination, dissolution, or substar if "Yes," attach the statement required by General Instruction By language in the governing instrument, or By state legislation that effectively amends the growling to the foundation have at least \$5,000 in assets a conflict with the state law remain in the governing to the found	Exempt foreign organizations trusts and taxable foundations trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, ente at credited to 2008 trusts and taxable foundations from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 3. If zero or less, enter from line 4. If zero or less, enter from line 4. If zero or less, enter from line 4. If zero or less, e	s enter 4% is only Others enter ins only Others enter is only Others is only Others is only	Refunded did it	*	2 3 4 5 7 8 9			Yes	(
c All other domestic foundations enter 2% of line 27 of Part I, line 12, col. (b) 2 Tax under section 511 (domestic section 4947(a)(1) 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) 5 Tax based on investment income. Subtract line 4 6 Credits/Payments a 2008 estimated tax payments and 2007 overpaym b Exempt foreign organizations—tax withheld at sou c Tax paid with application for extension of time to fill Backup withholding erroneously withheld 7 Total credits and payments Add lines 6a through 6 Enter any penalty for underpayment of estimated 10 Overpayment. If line 7 is more than the total of line 10 Overpayment. If line 7 is more than the total of line 11 Enter the amount of line 10 to be Credited to 200 Part VII-A Statements Regarding Ac 1 During the tax year, did the foundation attempt to 1 participate or intervene in any political campaign? b Did it spend more than \$100 during the year (either of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed published or distributed by the foundation in connect Did the foundation file Form 1120-POL for this year 1 Enter the amount (if any) of tax on political expend (1) On the foundation ▶ \$ Enter the reimbursement (if any) paid by the foundation managers ▶ \$ Has the foundation made any changes, not previous incorporation, or bylaws, or other similar instrumer 1 Did the foundation have unrelated business gross 1 If "Yes," attach a detailed description of the activition 1 Has the foundation have unrelated business gross 1 If "Yes," has it filed a tax return on Form 990-T for 1 Was there a liquidation, termination, dissolution, or substar If "Yes," attach the statement required by General Instruction 1 Are the requirements of section 508(e) (relating to 1 By language in the governing instrument, or 1 By state legislation that effectively amends the gronflict with the state law remain in the governing 1 Did the foundation have at least \$5,000 in assets 2 conflict with the state law remain in the gov	trusts and taxable foundations trusts and taxable foundations from line 3. If zero or less, entered to 2008 to the credited to	6a 6b 6c 6d 20 is attached local legislation or cal purposes (see p.	Refunded did it	*	3 4 5 7 8 9			Yes	
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 conflict with the state law remain in the governing in Did the foundation have at least \$5,000 in assets a 	verning instrument so that no r	mandatory direction	ns that						
7 Did the foundation have at least \$5,000 in assets a	-	mandatory and out of	10 11141				6	x	
	, a. c	Yes." complete Par	II. col. (c). an	nd Par	rt XV		7	X	
8a Enter the states to which the foundation reports or	any time during the year? If "Y	· ·	, (0),						
instructions) ▶ KY	· ·	p-3						. [
b If the answer is "Yes" to line 7, has the foundation	· ·		eneral					.	
(or designate) of each state as required by Genera	oth which it is registered (see p	PF to the Attorney 6	-				8b	x	
9 Is the foundation claiming status as a private opera	on the which it is registered (see purpose) in the which it is registered (see purpose).	•							
or 4942(j)(5) for calendar year 2008 or the taxable	on the which it is registered (see purple of the properties of the	explanation	2(j)(3)						
page 27)? If "Yes," complete Part XIV	ith which it is registered (see properties of the properties of Form 990-P. Instruction G? If "No," attach eng foundation within the mean	explanation ning of section 4942					ایا		X
10 Did any persons become substantial contributors of	ith which it is registered (see properties of the properties of Form 990-P. Instruction G? If "No," attach eng foundation within the mean	explanation ning of section 4942					9		
names and addresses	ith which it is registered (see properties of the explanation ning of section 4942 structions for Part X	IV on				9			

	990-PF (2008) WILLIAM A. MARQUARD FAMILY 26-127321	U				F	Page 5
	rt VII-A Statements Regarding Activities (continued)						
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the						l
	meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)				11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before						
	August 17, 2008?				12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption applications and exemption applications are the second of the foundation comply with the public inspection requirements for its annual returns and exemption applications.	ation?			13	X	L
	Website address ► N/A						
4		ohone no	▶ 8	59-2	52-	098	13
	111 WOODLAND AVENUE, UNIT 107			0506			
	Located at ► LEXINGTON, KY	ZIP+4	4	0502	2		
5	Section 4947(a)(1) nonexempt chantable trusts filing Form 990-PF in lieu of Form 1041—Check here		1 1	1			▶ L
	and enter the amount of tax-exempt interest received or accrued during the year	<u> </u>	15				
Pa	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Require	<u>:d</u>					
	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?	Ye	s X	No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a	_		,			
	disqualified person?	⊢ Ye		No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	⊢ Ye					
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	∐ Ye	s X	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)?	∐ Ye	s X	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.)	Ye	s X	No			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulation	tions					ĺ
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?			N/A	1b		ļ
	Organizations relying on a current notice regarding disaster assistance check here		•	▶ ∐			
С	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 2008?			N/A	1c		↓
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))						
а	At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and		_	,			
	6e, Part XIII) for tax year(s) beginning before 2008?	∐ Ye	s X	No			
	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 page 20 of the instructions.)			N/A	2b		<u> </u>
С	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?	∐ Ye	s X	No			
b	If "Yes," did it have excess business holdings in 2008 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 penod? (Use Schedule C, Form 4720, to determine if the						
	foundation had excess business holdings in 2008.)			N/A	3b		<u> </u>
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose	es?			4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize it	s					
	chantable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2	2008?			4b		X

orm	990-PF (2008	,											
> a	t VII-B	Statements Re	garding Activit	ties for Which	<u> Form 47</u>	20 May Be	Required	(cor	ntinu	ıed)		······································	
	• .	ear did the foundation pa	•					_					
	(1) Carry on	propaganda, or otherw	se attempt to influ	ence legislation (s	section 4945(e))?		Y	es	X	No		
	(2) Influence	the outcome of any sp	ecific public election	on (see section 49	955), or to car	ry on,		_					
	directly of	r indirectly, any voter re	gistration drive?					۱۷۰	es		No		
	(3) Provide a	a grant to an individual f	or travel, study, or	other similar purp	oses?			Y	es	X	No		
	(4) Provide a	a grant to an organization	n other than a cha	ırıtable, etc., orgar	nization desc	ribed in		_					
	section 5	09(a)(1), (2), or (3), or	section 4940(d)(2)?	(see page 22 of	the instruction	ns)		_ Y	es	X	No		
	(5) Provide fo	or any purpose other th	an religious, charit	able, scientific, lite	erary, or			_					
	education	nal purposes, or for the	prevention of crue	ity to children or a	anımals?			Y	es	X	No	- 1	
ь	If any answer	r is "Yes" to 5a(1)-(5), d	id any of the trans	actions fail to qual	lify under the	exceptions de	escribed in						
	•	section 53 4945 or in a	-					s)?		N	/A [5b	
	-	s relying on a current no							•	П			
С	_	is "Yes" to question 5a				e tax				_			
		aintained expenditure re	• •		•		N/A		es	\Box	No		
		ch the statement require	•	•	5(d)		•	_		_			
а	•	lation, during the year,			• •	emiums							
_		I benefit contract?	Coorro amy ramas,	an ood, or man oo	,,			7 Y	es	X	No		
b	•	dation, during the year,	nav premijims, dire	ectly or indirectly i	on a persona	l benefit contr	act?					6b	ĺ
•		red "Yes" to 6b, also file		oody or manoody,	on a porcone								
а		lunng the tax year, was		arty to a prohibite	d tax shelter	transaction?		7 v	es	X	No		
		e foundation receive an					nn?		-	_	/A	7b	
					attribi itable tr						,	,	
2.5	4 V/HI 1							hlv l	Paid	l Emi	plove	es.	
Pa		nformation About						hly l	Paid	l Em	ploye	es,	
	a	nformation About and Contractors	Officers, Dire	ctors, Trustee	es, Found	ation Mana	agers, Hig			l Em	ploye	ees,	
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	a	nformation About and Contractors s, directors, trustees, t	Officers, Dire	ctors, Trustee	mpensation (b)	ation Mana see page 22 Title, and average	of the instru (c) Compens (lf not paid, e	ctions	s).			(e)	Expension, other
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Form **990-PF** (2008)

Form 990-PF (2008)	WILLIAM A. MARQUARD FAMILY	26-1273210	Page 7
Part VIII Info	ormation About Officers, Directors, Trustees, Four	ndation Managers, Highly Paid Em	
	d Contractors (continued)		
	ind independent contractors for professional services (see page	(b) Type of service	
NONE	(a) Name and address of each person paid more than \$50,000	(a) Type of service	(c) Compensation
<u> </u>			
	•		
Total number of other	s receiving over \$50,000 for professional services		<u> </u>
Part IX-A S	ummary of Direct Charitable Activities		
List the foundation's fou of organizations and oth	ur largest direct chantable activities during the tax year. Include relevant statist her beneficianes served, conferences convened, research papers produced, e	ical information such as the number	Expenses
1 N/A			
·			
2			
		•	
3			
·			
	·		
4			
Part IX-B S	ummary of Program-Related Investments (see pag	ue 23 of the instructions)	
	at program-related investments made by the foundation during the tax year on		Amount
1 N/A			
2	•		
All other program-relate	ed investments. See page 24 of the instructions		
3			
Total. Add lines 1 thro	nugh 3	-	
			Form 990-PF (2008)

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation

Enter 1% of Part I, line 27b (see page 26 of the instructions)

Adjusted qualifying distributions. Subtract line 5 from line 4

qualifies for the section 4940(e) reduction of tax in those years

Form **990-PF** (2008)

<u>5</u>

15,184

Excess from 2006 Excess from 2007

Excess from 2008

2	6-	. 1	2	7	2	2	1	\sim	

Page 10

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, first the date of the ruling. 6 Check tox to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 1 4942(j)(5) or 1 certain income from Part to rith eminimum investment rulem from Part X for each year feeted 8.75 (e.g., 2005 (b), 2007 (c), 2006 (d), 2005 (d), 2005 (e),	Pa	rt XIV Private Operating For	undations (see p	age 27 of the inst	ructions and Part	VII-A, question 9)
b. Check look to indicate whether the foundation is a private operating foundation described in section. Enter the lessor of the adjusted to the transmit of	1a	If the foundation has received a ruling or	determination letter th	nat it is a private opera	ting		
2a Enter the lesser of the adjusted net imcome from Part of the humanium investment return from Part X for each year fished and the part of the humanium investment return from Part X for each year fished by a 5% of line 2a counts and taken in the 2 not used directly for achieve conduct of exempt activities Subtract line 26 from line 2b complete 3b, not or for the alternative test relied upon. 2 Conalitying distributions made directly for achieve conduct of exempt activities Subtract line 2b from line 2b complete 3b, not or for the alternative test relied upon. 2 Asset is alternative test—enter. (1) Value of all assets (2)		foundation, and the ruling is effective for	2008, enter the date of	of the ruling	_		
Income from Part I or the minimum investment return from Part X for each year Island B 85% of line 2a Countyling distributions from Part XII, line 4 for each year island Amounts included in line 2 and used directly for active conduct of exempt activities Countyling distributions and effectly for active conduct of exempt activities Subtract line 2 from line 2 Countyling distributions made directly for active conduct of exempt activities Subtract line 2 from line 2 Countyling distributions made directly for active conduct of exempt activities Subtract line 2 from line 2 Countyling distributions and effectly for active conduct of exempt activities Subtract line 2 from line 2 Countyling distributions and activities Subtract line 2 from line 2 Countyling distributions and activities Subtract line 2 from line 2 Countyling and activities Subtract line 2 from line 2 Countyling and activities Subtract line 3 from 1 from 2 Countyling and activities Subtract line 3 from 1 from 2 Countyling and activities Subtract line 3 from 1 from 2 Countyling and 3 from 3 fro	b				bed in section 4	942(j)(3) or 494	2(j)(5)
mocement form Part I of the minimum investment return from Part X for sach year listed b 85% of line 2a	2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		(e) Total
messtment return from Part X for each year listed be 85% of line 2a Coustlying distributions from Part XII, line 4 for each year listed d Amounts motivated in the 2 for oil used directly for active conduct of exempt activates County for active conduct of exempt activates County for active conduct of exempt activates County for active conduct of exempt activates Subtract line 24 from line 25 Compited 8a, b. or for the alternative test—enter. (1) You've of all assets (2) Value of assets qualifying under section 4942(0)(3)(8)(9) b "Endowment alternative test—enter." (1) You've of all assets (2) Value of assets qualifying under section 4942(0)(3)(8)(9) c "Support" alternative test—enter 20 of minimum investment return shown in Part X, line 6 for each year listed C "Support alternative lest—enter 30 of minimum investment income (interest, ovidenders, certs, payments on securities loans (section 512(6)(5)), or royalties (1) Total support other than gross investment income (interest, ovidenders, certs, payments on securities loans (section 512(6)(5)), or royalties (2) Support from general public exerts of the section 494(0)(3)(8)(9)(1) (3) Largest amount of support from an exempt organizations as provided in section 492(0)(3)(8)(9)(1) (3) Largest amount of support from an exempt organization and patternative test—enter and the section 492(0)(3)(8)(9)(1) (3) Largest amount of support from an exempt organization on the section 492(0)(3)(8)(9)(1) (3) Largest amount of support from an exempt organization on the section 492(0)(3)(8)(9)(1) (3) Largest amount of support from an exempt organization on the section 492(0)(3)(8)(9)(1) (3) Largest amount of support from an exempt organization of support from an exempt organization of support from an exempt organization of support from the section of the support of support support of the support of the support of support support of support support of support support of support support of support support of		income from Part I or the minimum	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(6) 10(2)
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ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. N/A 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. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d The name, address, and telephone number of the person to whom applications should be addressed. N/A The form in which applications should be submitted and information and materials they should include. N/A Any submission deadlines. N/A d Any restrictions or limitations on awards, such as by geographical areas, chantable fields, kinds of institutions, or other factors. N/A			400/				
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							Form 990-PF (2008)

Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient Purpose of grant or show any relationship to any foundation manager or substantial contributor status of Amount contribution recipient Name and address (home or business) a Paid during the year UK ART MUSEUM NONE UNIVERSITY GENERAL 10,000 Rose St. and Euclid Ave. Lexington KY 40506 UK ART MUSEUM NONE UNIVERSITY Rose St. and Euclid Ave. **GENERAL** 10,000 Lexington KY 40506 20,000 3a Total b Approved for future payment N/A ▶ 3b Total

Form **990-PF** (2008)

P	art XVI-A	Analysis of Income-Producing Acti	vities				
		ounts unless otherwise indicated		ed business income	Exclude	d by section 512, 513, or 514	(e)
	- G		(a) Business code	(b)	(c) Exclusion	(d)	Related or exempt function income (See page 28 of
1		rvice revenue.			code	- "	the instructions)
	h						
	<i>-</i>		- · · · · · · · · · · · · · · · · · · ·				
	a Foot an	d contracts from government agencies					
2		d contracts from government agencies dues and assessments					
		savings and temporary cash investments and interest from securities					
Э		come or (loss) from real estate					
		anced property					
_		t-financed property					· · · · · · · · · · · · · · · · · · ·
		come or (loss) from personal property					
		ment income					
		s) from sales of assets other than inventory					
		or (loss) from special events					
		or (loss) from sales of inventory					
11		ue a					
	ь						
	d						
	е						
		ld columns (b), (d), and (e)		0		0	
13	Total. Add I	ne 12, columns (b), (d), and (e)		0		13 _	0
13 Se	Total. Add le e worksheet	ne 12, columns (b), (d), and (e) in line 13 instructions on page 28 to verify calculation			•	13	
13 Se	Total. Add I	ne 12, columns (b), (d), and (e) in line 13 instructions on page 28 to verify calculation Relationship of Activities to the Act	complishm	ent of Exempt Pu	ırpose	13 <u> </u>	
Se	Total. Add le e worksheet	ne 12, columns (b), (d), and (e) in line 13 instructions on page 28 to verify calculation Relationship of Activities to the Acc Explain below how each activity for which income is the accomplishment of the foundation's exempt put	complishm s reported in c	ent of Exempt Pu	irpose	13	
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Pa	art XVII	Information Reg		ansfers To and Transactio	ns ar	d Relationsh	nips With I	Nonch	aritable		
1	Did the or			ge in any of the following with any of	other or	ganization descr	ıbed			Yes	No
		501(c) of the Code (other	-	on 501(c)(3) organizations) or in se							
а	-		tation to a no	enchantable exempt organization o	ıf						
u	(1) Cash	nom the reporting round		moranable exempt organization o	•				1a(1)	1	x
	(2) Other	assets							1a(2)		X
h	Other tran								1-(-/	1	
		of assets to a noncharit	able evemnt	organization					1b(1)	1	x
	• •	ases of assets from a no		=					1b(2)	1	X
	•	of facilities, equipment							1b(3)		X
		oursement arrangements		70.0					1b(4)		x
	• •	or loan guarantees	•						1b(5)		X
			embership oi	r fundraising solicitations					1b(6)	<u> </u>	X
c				ther assets, or paid employees					1c		X
	-		_	plete the following schedule. Colu	mn (b)	should always sh	now the fair m	arket	1		
		-		iven by the reporting organization					et		
		_		nt, show in column (d) the value of							
-	a) Line no	(b) Amount involved		of noncharitable exempt organization		Description of tra				ements	
<u> </u>		(-, -, -, -, -, -, -, -, -, -, -, -, -, -									
					l						
					<u> </u>						
			<u> </u>								
2a	Is the four	ndation directly or indirec	ctly affiliated	with, or related to, one or more tax	(-exem	ot organizations			_	_	
	described	in section 501(c) of the	Code (other	than section 501(c)(3)) or in section	n 527?	ı				es X	No
b	If "Yes," c	omplete the following so	hedule.								
		(a) Name of organization		(b) Type of organization	<u> </u>		(c) Description	on of relati	onship		
	N/A				<u> </u>	-					
			· · · · · · · · · · · · · · · · · · ·								
					<u> </u>						
ļ	Under pena	ilties of perjury, I declare tha	t I have exami	ned this return, including accompanying	schedul	es and statements,	and to the best	of my kno	wledge and		
1	belief, it is	rue, correct, and complete 1	Declaration of p	preparer (other than taxpayer or fiducian					ny knowledge		
-	De Du	sanne J. D'	proper	ard May 31	, 201	~	PRESID	ENT			
اه	Signat	re of officer or trustee	U	Date	·	/ T	itle				
<u>ē</u>						Date			Preparer's ident	fying	
-	w .			\sim .			Check if		number (see Si	gnature	on
Sign Here	- 등 로	Preparer's			,		self-employe	d ▶∐∐	page 30 of the ir		
Ø	Paid Preparer's Use Only	signature Paul I	H. Fishe		<u>~~</u>	5/27/10	<u> </u>		P0074)6 <u>31</u>	<u> </u>
}	Pre Us	Firm's name (or yours if	Keith		C						
		self-employed), address,		kewell St					35-234		
		and ZIP code	Covin	gton, KY 41011				Phone no	513-27		
									Form 9 9	30-PF	(2008)

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

► Attach to Form 990, 990-EZ, and 990-PF.

OMB No 1545-0047

Employer identification number

2008

WILLIAM A. MARQUARD FAMILY 26-1273210 FOUNDATION INC. Organization type (check one) Section: Filers of: 501(c)(Form 990 or 990-EZ) (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 organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II Special Rules For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1 Complete Parts I and II For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to 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 Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) **\$** Caution. Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they must answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Schedule B (Form 990, 990-EZ, or 990-PF) (2008) Page 1 of 1 of Part I Employer identification number Name of organization MARQUARD FAMILY 26-1273210 WILLIAM A. Part I Contributors (see instructions) (c) (b) (d) (a) Name, address, and ZIP + 4 Aggregate contributions Type of contribution No. MARGARET T. MARQUARD IRA 1 Person 111 WOODLAND AVE. UNIT 107 Payroll 100,000 Noncash **KY 40502** LEXINGTON (Complete Part II if there is a noncash contribution.) (b) (c) (d) (a) Aggregate contributions Type of contribution Name, address, and ZIP + 4 No. Person Payroli \$ Noncash (Complete Part II if there is a noncash contribution) (b) (c) (d) (a) No. Name, address, and ZIP + 4 Aggregate contributions Type of contribution Person Payroli Noncash (Complete Part II if there is a noncash contribution) (c) (d) (a) (b) Name, address, and ZIP + 4 Aggregate contributions Type of contribution No. Person Payroll Noncash (Complete Part II if there is a noncash contribution.) (d) (b) (c) (a) Aggregate contributions Type of contribution No. Name, address, and ZIP + 4 Person Payroli Noncash (Complete Part II if there is a noncash contribution) (c) (b) (a) Type of contribution Aggregate contributions Name, address, and ZIP + 4 No. Person Payroll Noncash \$ (Complete Part II if there is a noncash contribution.)

261273210 ·WILLIAM A. MARQUARD FAMILY

26-1273210

Federal Statements

5/27/2010 10:29 AM

FYE: 12/31/2008

Statement 1 - Form 990-PF, Part I, Line 23 - Other Expenses

Description							
	 Total	_	Net Investment	_	Adjusted Net	_	Charitable Purpose
Expenses	\$	\$		\$		\$	
Bank fees and charges							
bank rees and enarges	208		208				
Total	\$ 208	\$_	208	\$_	0	\$_	0

261273210 WILLIAM A. MARQUARD FAMILY 26-1273210 FYE: 12/31/2008		Federal Statements		5/27/	5/27/2010 10:29 AM
Statement 2 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.	00-PF, Part VIII, I	ine 1 - List of Office	rs, Directors, Truste	es, Etc.	
Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
SUZANNE T. MARQUARD 404 STRERLING PLACE BROOKLYN NY 11238	President	ις.	0	0	0
STEPHEN A. MARQUARD 136 CREST ROAD RIDGEWOOD NJ 07450	Officer	ιν	0	0	0
LEE ANN MARQUARD 136 CREST ROAD RIDGEWOOD NJ 07450	Officer	Ŋ	0	0	0
PAMELA A. MARQUARD 111 WOODLAND AVENUE, UNIT 605 LEXINGTON KY 40502	Officer	ς.	0	0	0
JAMES R. BECKENRIDGE 404 STRERLING PLACE BROOKLYN NY 11238	Officer	ĸ	0	0	0