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Return of Private Foundation

OMB No 1545-0052

Department of the Treasury
Internal Revenue Serviceor Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

2009

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2009, or tax year beginning, and ending

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type See Specific Instructions.	Name of foundation MARGARET AND MARSHALL BARTLETT FAMILY FOUNDATION, INC.		A Employer identification number 22-3512759	
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite P.O. BOX 489, YOUNG'S ROAD		B Telephone number (973) 993-5974	
	City or town, state, and ZIP code NEW VERNON, NJ 07976-0489		C If exemption application is pending, check here ☐	
	H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 3,415,668. (Part I, column (d) must be on cash basis)		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
				F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		2,000,002.		N/A	
2 Check ☐ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		9.	9.		STATEMENT 1
4 Dividends and interest from securities		65,933.	65,933.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		69,712.			
b Gross sales price for all assets on line 6a		69,712.			
7 Capital gain net income (from Part IV, line 2)			69,712.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		2,135,656.	135,654.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		2,495.	832.		1,663.
c Other professional fees					
17 Interest					
18 Taxes STMT 4		260.	260.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		30.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		2,785.	1,092.		1,663.
25 Contributions, gifts, grants paid		146,708.			146,708.
26 Total expenses and disbursements. Add lines 24 and 25		149,493.	1,092.		148,371.
27 Subtract line 26 from line 12		1,986,163.			
a Excess of revenue over expenses and disbursements			134,562.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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**MARGARET AND MARSHALL BARTLETT
FAMILY FOUNDATION, INC.**

22-3512759

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	26,599.	34,408.	34,408.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	688,648.	2,667,002.	3,381,260.
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	715,247.	2,701,410.	3,415,668.	
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			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	497,883.	497,883.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	217,364.	2,203,527.	
	30 Total net assets or fund balances	715,247.	2,701,410.	
	31 Total liabilities and net assets/fund balances	715,247.	2,701,410.	

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 30 (must agree with end-of-year figure reported on prior year's return)	1	715,247.
2 Enter amount from Part I, line 27a	2	1,986,163.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,701,410.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,701,410.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 1000 SHS EXXON MOBIL	D	VARIOUS	04/06/09
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 69,712.			69,712.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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			69,712.
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	69,712.
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) If (loss), enter -0- in Part I, line 8 }	3	N/A

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	97,634.	1,140,756.	.085587
2007	130,003.	1,360,435.	.095560
2006	112,028.	1,144,220.	.097908
2005	87,534.	1,102,555.	.079392
2004	58,860.	1,027,762.	.057270

2 Total of line 1, column (d)	2	.415717
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.083143
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,947,704.
5 Multiply line 4 by line 3	5	161,938.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,346.
7 Add lines 5 and 6	7	163,284.
8 Enter qualifying distributions from Part XII, line 4	8	148,371.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	2,691.
c	All other domestic foundations enter 2% 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	2,691.
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	2,691.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	585.
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	585.
8	Enter any penalty for underpayment of estimated tax. Check here ☒ 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	2,106.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2010 estimated tax. Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) NJ		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

N/A

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Part 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 meaning of section 512(b)(13)? If "Yes," attach schedule (see 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 application? Website address N/A	13	X	
14	The books are in care of MARSHALL BARTLETT Telephone no (973) 993-5974 Located at YOUNG'S ROAD, NEW VERNON, NJ ZIP+4 07976-0489			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15 N/A			

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? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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) ☐ Yes ☒ 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A	1b	
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 2009? N/A	1c	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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No If "Yes," list the years N/A	2a	
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	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here N/A		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No	3a	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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 2009?	4b	X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

(3) Provide a grant to an individual for travel, study, or other similar purposes?

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here

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?

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

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

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

(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 8		0.	0.	0.

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services 0

Part 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

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	0.

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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	1,923,030.
b	Average of monthly cash balances	1b	54,334.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,977,364.
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	1,977,364.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	29,660.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,947,704.
6	Minimum investment return. Enter 5% of line 5	6	97,385.

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	97,385.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,691.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,691.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	94,694.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	94,694.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	94,694.

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	148,371.
b	Program-related investments - total from Part IX-B	1b	0.
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	148,371.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	148,371.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				94,694.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004	8,726.			
b From 2005	33,932.			
c From 2006	57,301.			
d From 2007	63,925.			
e From 2008	41,426.			
f Total of lines 3a through e	205,310.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 148,371.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				94,694.
e Remaining amount distributed out of corpus	53,677.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	258,987.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	8,726.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	250,261.			
10 Analysis of line 9				
a Excess from 2005	33,932.			
b Excess from 2006	57,301.			
c Excess from 2007	63,925.			
d Excess from 2008	41,426.			
e Excess from 2009	53,677.			

N/A

- ☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income**

[illegible]

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

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 Paid during the year				
SEE STATEMENT 10				
Total			3a	146,708.
b Approved for future payment				
NONE				
Total			3b	0.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash		X
	(2) Other assets		X
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization		X
	(2) Purchases of assets from a noncharitable exempt organization		X
	(3) Rental of facilities, equipment, or other assets		X
	(4) Reimbursement arrangements		X
	(5) Loans or loan guarantees		X
	(6) Performance of services or membership or fundraising solicitations		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than tax payer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

Title

Sian Here

**Paid
Preparer's
Use Only**

Preparer's
signature

Firm's name (or yours if self-employed),
address, and ZIP code

NAME *Jane E. Ulacki*
 FIRM CLYNE EAGAN & ASSOCIATES
 ADDRESS 8 RIDGEDALE AVENUE
 CITY CEDAR KNOLLS, NJ 07927

Date	Time	Location	Activity	Remarks
10/10/2023	08:00	...	...	...
10/10/2023	08:30	...	...	...
10/10/2023	09:00	...	...	...
10/10/2023	09:30	...	...	...
10/10/2023	10:00	...	...	...
10/10/2023	10:30	...	...	...
10/10/2023	11:00	...	...	...
10/10/2023	11:30	...	...	...
10/10/2023	12:00	...	...	...
10/10/2023	12:30	...	...	...
10/10/2023	13:00	...	...	...
10/10/2023	13:30	...	...	...
10/10/2023	14:00	...	...	...
10/10/2023	14:30	...	...	...
10/10/2023	15:00	...	...	...
10/10/2023	15:30	...	...	...
10/10/2023	16:00	...	...	...
10/10/2023	16:30	...	...	...
10/10/2023	17:00	...	...	...
10/10/2023	17:30	...	...	...
10/10/2023	18:00	...	...	...
10/10/2023	18:30	...	...	...
10/10/2023	19:00	...	...	...
10/10/2023	19:30	...	...	...
10/10/2023	20:00	...	...	...
10/10/2023	20:30	...	...	...
10/10/2023	21:00	...	...	...
10/10/2023	21:30	...	...	...
10/10/2023	22:00	...	...	...
10/10/2023	22:30	...	...	...
10/10/2023	23:00	...	...	...
10/10/2023	23:30	...	...	...
10/10/2023	00:00	...	...	...
10/10/2023	00:30	...	...	...
10/10/2023	01:00	...	...	...
10/10/2023	01:30	...	...	...
10/10/2023	02:00	...	...	...
10/10/2023	02:30	...	...	...
10/10/2023	03:00	...	...	...
10/10/2023	03:30	...	...	...
10/10/2023	04:00	...	...	...
10/10/2023	04:30	...	...	...
10/10/2023	05:00	...	...	...
10/10/2023	05:30	...	...	...
10/10/2023	06:00	...	...	...
10/10/2023	06:30	...	...	...
10/10/2023	07:00	...	...	...
10/10/2023	07:30	...	...	...
10/10/2023	08:00	...	...	...
10/10/2023	08:30	...	...	...
10/10/2023	09:00	...	...	...
10/10/2023	09:30	...	...	...
10/10/2023	10:00	...	...	...
10/10/2023	10:30	...	...	...
10/10/2023	11:00	...	...	...
10/10/2023	11:30	...	...	...
10/10/2023	12:00	...	...	...
10/10/2023	12:30	...	...	...
10/10/2023	13:00	...	...	...
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10/10/2023	15:00	...	...	...
10/10/2023	15:30	...	...	...
10/10/2023	16:00	...	...	...
10/10/2023	16:30	...	...	...
10/10/2023	17:00	...	...	...
10/10/2023	17:30	...	...	...
10/10/2023	18:00	...	...	...
10/10/2023	18:30	...	...	...
10/10/2023	19:00	...	...	...
10/10/2023	19:30	...	...	...
10/10/2023	20:00	...	...	...
10/10/2023	20:30	...	...	...
10/10/2023	21:00	...	...	...
10/10/2023	21:30	...	...	...
10/10/2023	22:00	...	...	...
10/10/2023	22:30	...		

5/6/2010

☐ Check if self-employed

Preparer's identifying number	
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FIN ▶

Phone no (973) 993-9767

Form 990-PF (2009)

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

MARGARET AND MARSHALL BARTLETT
FAMILY FOUNDATION, INC.

Employer identification number

22-3512759

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, \$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 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 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 (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II

☐For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions 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 990-EZ that received from any one contributor, during the year, 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.** An organization that is not covered by the General Rule and/or the Special Rules does not 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 line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

MARGARET AND MARSHALL BARTLETT
FAMILY FOUNDATION, INC.

Employer identification number

22-3512759

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	MARSHALL BARTLETT P.O. BOX 489, YOUNG'S ROAD NEW VERNON, NJ 07976	\$ 0.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
2	ESTATE OF EDMUND BARTLETT, MARSHALL BARTLETT, EXECUTOR P.O. BOX 489, YOUNG'S ROAD NEW VERNON, NJ 07976	\$ 1,915,425.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
3	ESTATE OF EDMUND BARTLETT, MARSHALL BARTLETT, EXECUTOR P.O. BOX 489, YOUNG'S ROAD NEW VERNON, NJ 07976	\$ 84,577.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Name of organization

MARGARET AND MARSHALL BARTLETT
FAMILY FOUNDATION, INC.

Employer identification number

22-3512759

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	1000 SHARES OF EXXON MOBIL STOCK	\$ 70,095.	04/03/09
2	VARIOUS PUBLICLY TRADED SECURITIES - SEE ATTACHED STMT	\$ 1,915,425.	06/05/09
		\$	
		\$	
		\$	
		\$	

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
SCHWAB	9.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	9.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
SCHWAB SECURITIES ACCOUNT	65,933.	0.	65,933.
TOTAL TO FM 990-PF, PART I, LN 4	65,933.	0.	65,933.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	2,495.	832.		1,663.
TO FORM 990-PF, PG 1, LN 16B	2,495.	832.		1,663.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX	260.	260.		0.
TO FORM 990-PF, PG 1, LN 18	260.	260.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
NJ CHARITIES REGISTRATION FEE	30.	0.		0.
TO FORM 990-PF, PG 1, LN 23	30.	0.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED STATEMENT	2,667,002.	3,381,260.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,667,002.	3,381,260.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	7
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NAME OF CONTRIBUTOR	ADDRESS
MARSHALL BARTLETT	PO BOX 489, YOUNG'S RD NEW VERNON, NJ 07976-0489
MARGARET BARTLETT	PO BOX 489, YOUNG'S RD NEW VERNON, NJ 07976-0489
ESTATE OF EDMUND BARTLETT, MARSHALL BARTLETT, EXECUTOR	PO BOX 489, YOUNG'S RD NEW VERNON, NJ 07976-0489

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 8
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MARSHALL P. BARTLETT YOUNG'S ROAD, P.O. BOX 489 NEW VERNON, NJ 07976	TRUSTEE, PRES., & TREASURER 0.00	0.	0.	0.
MARGARET W. BARTLETT YOUNG'S ROAD, P.O. BOX 489 NEW VERNON, NJ 07976	TRUSTEE & VICE-PRESIDENT 0.00	0.	0.	0.
JOHN P. BARTLETT 19 CLEVELAND LANE PRINCETON, NJ 085403049	TRUSTEE & VICE- PRESIDENT 0.00	0.	0.	0.
STEPHEN W. BARTLETT 103 EAST 75TH, APT 6FW NEW YORK, NY 10021	TRUSTEE & VICE- PRESIDENT 0.00	0.	0.	0.
MARSHALL P. BARTLETT YOUNG'S ROAD, P.O. BOX 489 NEW VERNON, NJ 07976	TRUSTEE & SECRETARY 0.00	0.	0.	0.
DAVID L. SCULL 8401 CONNECTICUT AVENUE # 1202 CHEVY CHASE, MD 208155804	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF PART XV - LINE 1A STATEMENT 9
 LIST OF FOUNDATION MANAGERS

NAME OF MANAGER

MARSHALL P. BARTLETT
MARGARET W. BARTLETT

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 10

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CALVARY EPISCOPAL CHURCH 31 WOODLAND AVE SUMMIT, NJ 07901	NONE GENERAL	PUBLIC	7,500.
GREAT SWAMP WATERSHED ASSOCIATION P.O. BOX 300 NEW VERNON, NJ 07976	NONE GENERAL	PUBLIC	1,000.
HARDING LAND TRUST P.O. BOX 576 - 110 HARTER ROAD NEW VERNON, NJ 07976	NONE GENERAL	PUBLIC	1,000.
THE PECK SCHOOL 247 SOUTH STREET MORRISTOWN, NJ 07960-9947	NONE GENERAL	PUBLIC	250.
CAMP PASQUANEY 5 SOUTH STATE STREET CONCORD, NH 03301-3721	NONE GENERAL	PUBLIC	250.
MCCARTER THEATRE 91 UNIVERSITY PLACE PRINCETON, NJ 08540-5121	NONE GENERAL	PUBLIC	250.
DREW UNIVERSITY - OFFICE OF ANNUAL GIVING 36 MADISON AVENUE MADISON, NJ 07940	NONE GENERAL	PUBLIC	1,000.
CONNECTICUT COLLEGE- OFFICE OF COLLEGE ADVANCEMENT BECHE HOUSE 270 MOHEGAN AVENUE NEW LONDON, CT 06320-4196	NONE GENERAL	PUBLIC	2,500.

U.S. FUND FOR UNICEF - DEPT F P.O. BOX 27780 NEWARK, NJ 07101-7780	NONE GENERAL	PUBLIC	250.
PAPER MILL PLAYHOUSE 22-24 BROOKSIDE DRIVE MILLBURN, NJ 07041-9964	NONE GENERAL	PUBLIC	250.
HELEN KELLER INTL. 352 PARK AVE. SOUTH, STE. 1200 NEW YORK, NY 10010	NONE GENERAL	PUBLIC	250.
SHEPHERD'S TABLE 8210 A COLONIAL LANE SILVER SPRING, MD 20910-3350	NONE GENERAL	PUBLIC	100.
NJ SYMPHONY ORCHESTRA, DEVELOPMENT DEPARTMENT 60 PARK PLACE, 9TH FLOOR NEWARK, NJ 07102-9238	NONE GENERAL	PUBLIC	250.
ST. HUBERT'S GIRALDA 575 WOODLAND AVE., P.O. BOX 159 MADISON, NJ 07940-9989	NONE GENERAL	PUBLIC	100.
PHYSICIANS FOR HUMAN RIGHTS 2 ARROW STREET, SUITE 301 CAMBRIDGE, MA 02138-9845	NONE GENERAL	PUBLIC	50.
HOSPICE CARE NETWORK 99 SUNNYSIDE BLVD. WOODBURY, NY 11797-9834	NONE GENERAL	PUBLIC	50.
ST. FRANCIS EPISCOPAL DAY SCHOOL 345 PINEY POINT ROAD HOUSTON, TX 77024-6505	NONE GENERAL	PUBLIC	100.
FRIENDS OF HISTORIC SPEEDWELL 333 SPEEDWELL AVENUE MORRISTOWN, NJ 07960	NONE GENERAL	PUBLIC	50.

PG CHAMBERS SCHOOL 15 HALKO DRIVE CEDAR KNOLLS, NJ 07927	NONE GENERAL	PUBLIC	250.
MEMORIAL SLOAN KETTERING CANCER CENTER P.O. BOX 71051 PHILADELPHIA, PA 19176-6051	NONE GENERAL	PUBLIC	100.
ST. PAUL'S SCHOOL 325 PLEASANT STREET CONCORD, NH 03301	NONE GENERAL	PUBLIC	31,000.
HARDING TOWNSHIP LIBRARY ENRICHING OUR COMMUNITY CAMPAIGN P.O. BOX 283 NEW VERNON, NJ 07976-0283	NONE GENERAL	PUBLIC	500.
UNITED WAY OF MORRIS COUNTY P.O. BOX 1948 MORRISTOWN, NJ 07962	NONE GENERAL	PUBLIC	1,000.
PRINCETON UNIVERSITY ANNUAL GIVING P.O. BOX 5357 PRINCETON, NJ 08543-5357	NONE GENERAL	PUBLIC	1,000.
GLEN ALPIN CONSERVANCY, INC. P.O. BOX 235 NEW VERNON, NJ 07976	NONE GENERAL	PUBLIC	500.
CAMBRIDGE IN AMERICA P.O. BOX 9123 JAF BLG NEW YORK, NY 10087-9123	NONE GENERAL	PUBLIC	500.
EAST WOODS SCHOOL 31 FELLOW COTE ROAD OYSTER BAY, NY 11771-4199	NONE GENERAL	PUBLIC	250.
EAGLEBROOK SCHOOL GOLD EAGLE SOCIETY 271 PINE NOOK ROAD DEERFIELD, MA 01342-0701	NONE GENERAL	PUBLIC	2,500.

AMERICAN INDIAN COLLEGE FUND P.O. BOX 172449 DENVER, CO 80217-9673	NONE GENERAL	PUBLIC	250.
COLLEGE OF ST. ELIZABETH 2 CONVENT ROAD MORRISTOWN, NJ 07960-6989	NONE GENERAL	PUBLIC	250.
INTERLOCHEN CENTER FOR ARTS P.O. BOX 199 INTERLOCHEN, MI 49643-0199	NONE GENERAL	PUBLIC	1,500.
SUMMIT SPEECH SCHOOL 705 CENTRAL AVENUE NEW PROVIDENCE, NJ 07974	NONE GENERAL	PUBLIC	75.
SPECIAL OLYMPICS NJ P.O. BOX 3589 PRINCETON, NJ 08543-3589	NONE GENERAL	PUBLIC	50.
HARVARD LAW SCHOOL FUND - ALUMNI CENTER 125 MOUNT AUBURN STREET CAMBRIDGE, MA 02138	NONE GENERAL	PUBLIC	2,500.
JUDITH G. WHARTON MUSIC CENTER 60 LOCUST AVENUE BERKELEY HEIGHTS, NJ 07922	NONE GENERAL	PUBLIC	8,333.
PRINCETON UNIVERSITY P.O. BOX 44 PRINCETON, NJ 08540	NONE GENERAL	PUBLIC	1,000.
NEW VERNON VOLUNTEER FIRE DEPARTMENT P.O. BOX 243 NEW VERNON, NJ 07976	NONE GENERAL	PUBLIC	1,000.
GREAT SWAMP WATERSHED ASSOCIATION P.O. BOX 300 NEW VERNON, NJ 07976	NONE GENERAL	PUBLIC	2,000.

THE LUMPS SCHOOL 50 LOOMIS PLACE NEW HAVEN, CT 06511	NONE GENERAL	PUBLIC	500.
FOXCROFT SCHOOL P.O. BOX 5555 MIDDLEBURG, VA 20118-5555	NONE GENERAL	PUBLIC	5,000.
WESTERN COLLEGE ALUMNAE ASSOCIATION 325 SOUTH PATTERSON AVENUE OXFORD, OH 45056-2499	NONE GENERAL	PUBLIC	2,500.
DREW UNIVERSITY - CASPERSEN SCHOOL OF GRADUATE STUDIES 36 MADISON AVENUE MADISON, NJ 07940	NONE GENERAL	PUBLIC	1,000.
DREW UNIVERSITY - JANET SILER FORUM 36 MADISON AVENUE MADISON, NJ 07940	NONE GENERAL	PUBLIC	1,000.
THE ROBERT WOOD JOHNSON UNIVERSITY HOSPITAL FOUNDATION 8 EASTON AVENUE NEW BRUNSWICK, NJ 08901	NONE GENERAL	PUBLIC	300.
SUMMIT AREA YMCA 490 MORRIS AVENUE SUMMIT, NJ 07901-1532	NONE GENERAL	PUBLIC	500.
BOY SCOUTS OF AMERICA GREATER NYC COUNCIL - GIFT OF CAMP 350 FIFTH AVENUE NEW YORK, NY 10118-0350	NONE GENERAL	PUBLIC	1,500.
U.S. FUND FOR UNICEF - DEPT B P.O. BOX 27708 NEWARK, NJ 07101-7708	NONE GENERAL	PUBLIC	250.
AMERICAN INDIAN COLLEGE FUND P.O. BOX 172449 DENVER, CO 80217-9673	NONE GENERAL	PUBLIC	250.

AMERICAN HELLENIC INSTITUTE 1220 SIXTEENTH STREET NW WASHINGTON, DC 20036	NONE GENERAL	PUBLIC	250.
CENTER FOR BALKAN DEVELOPMENT 2 CLOCK TOWER PLACE, STE. 290 MAYNARD, MA 01754	NONE GENERAL	PUBLIC	500.
AMISTAD MISSION 55 SCOTT STREET BUFORD, GA 30518	NONE GENERAL	PUBLIC	500.
WORLD SCOUT FOUNDATION CONFERENCE RM 4-2, 600 FIFTH AVENUE NEW YORK, NY 10020	NONE GENERAL	PUBLIC	2,000.
FAIRLEIGH DICKINSON UNIVERSITY 1000 RIVER ROAD TEANECK, NJ 07666	NONE GENERAL	PUBLIC	25,000.
CHILDREN'S NATIONAL MEDICAL CENTER - BUILLETT ENDOWED FUND FOR NURSING EDUC - 801 ROEDER ROAD, STE. 300 SILVER SPRING, MD 20910	NONE GENERAL	PUBLIC	25,000.
SOUTH ASIAN INTERNATIONAL FILM FESTIVAL 114 FRANKLIN STREET, 3RD FLOOR NEW YORK, NY 10013	NONE GENERAL	PUBLIC	250.
WNYC RADIO 160 VARICK STREET, P.O BOX 1550 NEW YORK, NY 10116-1550	NONE GENERAL	PUBLIC	100.
ST. ANDREW'S EPISCOPAL CHURCH 380 GILCHRIST AVENUE, P.O. BOX 272 BOCA GRANDE, FL 33921	NONE GENERAL	PUBLIC	550.
COMMUNITY FOOD BANK OF NJ 31 EVANS TERMINAL HILLSIDE, NJ 07205-2400	NONE GENERAL	PUBLIC	500.

EAGLEBROOK SCHOOL NONE
271 PINE NOOK ROAD DEERFIELD, GENERAL
MA 01342-0701

PUBLIC 7,500.

TURIBA SCHOOL OF BUSINESS NONE
ADMINISTRATION GENERAL
68 GRAUDU STREET RIGA, LATVIA
LV-1058

PUBLIC 2,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

146,708.

**MARGARET AND MARSHALL BARTLETT FAMILY FOUNDATION
FOR THE YEAR ENDED DECEMBER 31, 2009
FID # 22-3512759**

ATTACHMENT TO 2009 FORM 990-PF SCHEDULE B, SCHEDULE OF CONTRIBUTORS, PART II, NONCASH PROPERTY 2(B)
BEQUEST OF VARIOUS PUBLICLY TRADED SECURITIES BY THE ESTATE OF EDMUND BARTLETT

Description	Fair Market Value	Date Received
2000 shs Aetna Inc New	\$ 50,800	06/05/09
837 shs Anadarko Pete Corp	40,561	06/05/09
3867 shs Burlington Northn Santa Fe	297,682	06/05/09
250 shs Canadian Pac Ltd	10,548	06/05/09
4286 shs Cleco Corp	91,292	06/05/09
333 shs Corning Inc	5,188	06/05/09
3733 shs E I duPont deNemours & Co	100,791	06/05/09
1666 shs Duke Energy Corp	23,541	06/05/09
1350 shs Encana Corp	73,778	06/05/09
3016 shs Exxon Mobil Corp	220,078	06/05/09
663 shs Firstenergy Corp	25,943	06/05/09
533 shs International Bus Machines	57,159	06/05/09
6491 shs Kansas City Southern	103,661	06/05/09
1664 shs Millipore Corp	109,791	06/05/09
1166 shs Newmont Mining Corp	52,283	06/05/09
14433 shs Norfolk Southern Corp	587,423	06/05/09
266 shs Penn Virginia Corp	5,429	06/05/09
3013 shs Sealed Air Corp	59,477	06/05/09
	\$ 1,915,425	

MARGARET AND MARSHALL BARTLETT FAMILY FOUNDATION
 FOR THE YEAR ENDED DECEMBER 31, 2009
 FID # 22-3512759

ATTACHMENT TO 2009 FORM 990-PF PG 2, PART II, LINE 10(b), STATEMENT 6

<u>CORPORATE STOCK</u>	<u>12/31/2009 BOOK VALUE</u>	<u>12/31/2009 FAIR MARKET VALUE</u>
AETNA	50,800.00	63,400.00
AMEREN CORPORATION	38,747.34	27,950.00
ANADARKO PETE CORP	40,561.00	52,245.54
AT&T INC NEW	144,989.84	140,150.00
BURLINGTON NORTHN SANTA FE	297,682.00	381,363.54
CANANDIAN PAC LTD	10,548.00	13,500.00
CENOVUS ENERGY INC	35,782.00	34,020.00
CLECO CORPORATION NEW	120,798.70	171,796.38
CONSOLIDATED EDISON INC	19,929.95	22,715.00
CONSTELLATION ENERGY CO	91,133.92	105,510.00
CORNING INC.	5,188.00	6,430.23
DOMINION RES INC VA NEW	66,438.95	124,544.00
E I DUPONT DENEMOURS & CO	100,791.00	125,690.11
DUKE ENERGY CORP	23,541.00	28,671.86
ENCANA CORP	37,996.00	43,726.50
EXXON MOBIL CORP	220,078.00	205,661.04
FIRST ENERGY CORP	85,809.83	123,696.35
GENERAL ELECTRIC	62,928.60	60,520.00
HONEYWELL INTERNATIONAL	101,432.30	78,400.00
INTERNATIONAL BUS MACHINES	57,159.00	69,769.70
KANSAS CITY SOUTHERN	103,661.00	216,085.39
MILLIPORE	109,791.00	120,390.40
NEWMONT MINING CORP	52,283.00	55,163.46
NORFOLK SOUTHERN CORP	587,423.00	756,577.86
ONEOK INC NEW	94,070.00	222,850.00
PENN VIRGINIA CORP	5,429.00	5,663.14
SCANA CORPORATION NEW	30,231.56	47,552.16
SEALED AIR CORP	59,477.00	65,864.18
WINDSTREAM CORPORATION	12,300.78	11,352.67
TOTAL	2,667,001.77	3,381,259.51
difference due to rounding	0.23	0.49
To pg 2, part II, Line 10(b), stmt 6	2,667,002	3,381,260