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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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
THE GEORGE PRESTON MARSHALL FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) Room/suite
4300 MONTGOMERY AVENUE 104

City or town, state, and ZIP code
BETHESDA, MD 20814

A Employer identification number
23-7173302

B Telephone number
(301) 654-7774

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16)
\$ **56,514.** (Part I, column (d) must be on cash basis.)

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

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	440,861.		N/A	
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	20.	20.		STATEMENT 1
4	Dividends and interest from securities				
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		0.		
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	440,881.	20.		
13	Compensation of officers, directors, trustees, etc.	46,000.	0.		46,000.
14	Other employee salaries and wages				
15	Pension plans, employee benefits	7,200.	0.		7,200.
16a	Legal fees				
b	Accounting fees	5,683.	0.		5,683.
c	Other professional fees				
17	Interest				
18	Taxes	3,619.	0.		3,619.
19	Depreciation and depletion	179.	0.		
20	Occupancy	14,959.	0.		14,959.
21	Travel, conferences, and meetings				
22	Printing and publications	3,338.	0.		3,338.
23	Other expenses	6,363.	0.		6,363.
24	Total operating and administrative expenses. Add lines 13 through 23	87,341.	0.		87,162.
25	Contributions, gifts, grants paid	323,360.			323,360.
26	Total expenses and disbursements. Add lines 24 and 25	410,701.	0.		410,522.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	30,180.			
b	Net investment income (if negative, enter -0-)		20.		
c	Adjusted net income (if negative, enter -0-)			N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		1,340.	341.	341.
	2	Savings and temporary cash investments		23,446.	54,804.	54,804.
	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				
	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 ▶	1,309.				
	Less: accumulated depreciation STMT 5 ▶	1,040.		448.	269.	
15	Other assets (describe ▶ SECURITY DEPOSITS)			1,100.	1,100.	
16	Total assets (to be completed by all filers)			26,334.	56,514.	
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 ▶ <input type="checkbox"/>					
	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 ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		0.	0.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds		26,334.	56,514.		
30	Total net assets or fund balances		26,334.	56,514.		
31	Total liabilities and net assets/fund balances		26,334.	56,514.		

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	26,334.
2	Enter amount from Part I, line 27a	2	30,180.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	56,514.
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	56,514.

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				
b	NONE			
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7 }

2

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

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	409,752.	58,091.	7.053623
2007	428,568.	78,913.	5.430892
2006	604,843.	72,554.	8.336453
2005	606,266.	120,046.	5.050281
2004	671,533.	144,363.	4.651697

2 Total of line 1, column (d)

2

30.522946

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

6.104589

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

4

28,919.

5 Multiply line 4 by line 3

5

176,539.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

0.

7 Add lines 5 and 6

7

176,539.

8 Enter qualifying distributions from Part XII, line 4

8

410,522.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	0.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a		
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		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0.
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 <input type="checkbox"/> Refunded <input type="checkbox"/>	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
b 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
c 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. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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) <input type="checkbox"/> <u>MD, DC</u>		
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

SEE STATEMENT 6

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?	13	X	

Website address ► N/A

14 The books are in care of ► BARBARA JONES Telephone no. ► (301) 654-7774
 Located at ► 4300 MONTGOMERY AVENUE, STE 104, BETHESDA, MD ZIP+4 ► 20814

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <u>N/A</u> <input type="checkbox"/>	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?	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____ , _____ , _____		
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.) <u>N/A</u>	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. ► _____ , _____ , _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 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.) <u>N/A</u>	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))?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(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)?

☐ Yes ☒ No

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

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

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?

N/A

☐ Yes ☐ No

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?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?**6b****X**

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**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 7		46,000.	7,200.	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

Form 990-PF (2009)

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	0.
b	Average of monthly cash balances	1b	28,259.
c	Fair market value of all other assets	1c	1,100.
d	Total (add lines 1a, b, and c)	1d	29,359.
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	29,359.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	440.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	28,919.
6	Minimum investment return Enter 5% of line 5	6	1,446.

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	1,446.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,446.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,446.
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	1,446.

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	410,522.
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	410,522.
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	410,522.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,446.
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	664,331.			
b From 2005	600,307.			
c From 2006	601,285.			
d From 2007	424,704.			
e From 2008	396,869.			
f Total of lines 3a through e	2,687,496.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$	410,522.			
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				1,446.
e Remaining amount distributed out of corpus	409,076.			
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	3,096,572.			
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	664,331.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	2,432,241.			
10 Analysis of line 9:				
a Excess from 2005	600,307.			
b Excess from 2006	601,285.			
c Excess from 2007	424,704.			
d Excess from 2008	396,869.			
e Excess from 2009	409,076.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2009	(b) 2008	(c) 2007	(d) 2006	

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

a The name, address, and telephone number of the person to whom applications should be addressed:

**THE GEORGE PRESTON MARSHALL FOUNDATION, (301) 654-7774
4300 MONTGOMERY AVENUE, #104, BETHESDA, MD 20814**

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

SEE ATTACHED

c Any submission deadlines:

NONE

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

METROPOLITAN DC PROGRAMS BENEFITING CHILDREN

Part XV	Supplementary Information (continued)
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3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year SEE ATTACHED SCHEDULE		N/A	N/A	TO SUPPORT YOUTH ACTIVITIES	323,360.
Total					323,360.
b Approved for future payment NONE					
Total					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 taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

➤ Title

Sign Here

**Paid
Preparer's
Use Only**

Preparer's
signature

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

Neal L. Kubi

Date
FEB 17 2010

Check if self-employed	
------------------------	--

Preparer's identifying number

EIN

Phone no. (301) 296-3600

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

Employer identification number

THE GEORGE PRESTON MARSHALL FOUNDATION

23-7173302

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

Employer identification number

THE GEORGE PRESTON MARSHALL FOUNDATION

23-7173302

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	TRUST FOR GEORGE PRESTON MARSHALL ESTATE C/O COVINGTON & BURLING, 1201 PENNSYLVANIA AVE., NW, WASHINGTON, DC 20004-2401	\$ 440,861.	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

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

SOURCE	AMOUNT
SUNTRUST INVESTMENT SERVICES, INC.	20.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	20.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
RSM MCGLADREY, INC.	5,683.	0.		5,683.
TO FORM 990-PF, PG 1, LN 16B	5,683.	0.		5,683.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	3,608.	0.		3,608.
FEDERAL EXCISE TAXES	11.	0.		11.
TO FORM 990-PF, PG 1, LN 18	3,619.	0.		3,619.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK SERVICE CHARGES	749.	0.		749.
DELIVERY & COURIER EXPENSE	365.	0.		365.
OFFICE SUPPLIES & EXPENSES	1,024.	0.		1,024.
INSURANCE EXPENSE	645.	0.		645.
POSTAGE EXPENSE	824.	0.		824.
TELEPHONE EXPENSE	1,982.	0.		1,982.
REPAIRS & MAINTENANCE	649.	0.		649.
MEETING REGISTRATION FEE	125.	0.		125.
TO FORM 990-PF, PG 1, LN 23	6,363.	0.		6,363.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 5

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER - DELL DESKTOP	1,309.	1,040.	269.
TOTAL TO FM 990-PF, PART II, LN 14	1,309.	1,040.	269.

FORM 990-PF EXPLANATION CONCERNING PART VII-A, LINE 8B STATEMENT 6

EXPLANATION

THE ORGANIZATION HAS FURNISHED A COPY OF FORM 990-PF TO MARYLAND (STATE WHERE PRINCIPAL OFFICE IS LOCATED). THE DISTRICT OF COLUMBIA (STATE WHERE ORGANIZATION WAS CREATED) HAS NO STATUTORY REQUIREMENT FOR SUBMISSION OF COPIES OF FORM 990-PF.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS STATEMENT 7

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
BARBARA J. JONES 4300 MONTGOMERY AVENUE, SUITE 104 BETHESDA, MD 20814	EXECUTIVE DIRECTOR 24.00	46,000.	7,200.	0.
JAMES C. MCKAY 1201 PENNSYLVANIA AVENUE, NW WASHINGTON, DC 20004-2401	VICE-PRESIDENT/DIRECTOR 1.00	0.	0.	0.
WILLIAM D. FOOTE, JR. 200-A MONROE STREET, SUITE 110 ROCKVILLE, MD 20850	PRESIDENT/DIRECTOR 1.00	0.	0.	0.
ELLIN J. NOLAN 7503 LYNN DRIVE CHEVY CHASE, MD 20815	SECRETARY/DIRECTOR 1.00	0.	0.	0.
G. DEWEY ARNOLD, III 4803 JAMESTOWN ROAD BETHESDA, MD 20816	TREASURER/DIRECTOR 1.00	0.	0.	0.

THE GEORGE PRESTON MARSHALL FOUNDATION

23-7173302

PHILIP O'DONOGHUE DIRECTOR
8401 CONNECTICUT AVENUE, SUITE
1100 1.00
CHEVY CHASE, MD 20815-5819

0. 0. 0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

46,000. 7,200. 0.

THE GEORGE PRESTON MARSHALL FOUNDATION
GRANTS PAID OUT IN 2009

Archbishop Carroll High School David S. Scotfa, Ph.D, Principal/CEO 4300 Harewood Road, NE Washington, DC 20017	\$10,000
Bishop John T. Walker School for Boys Mr. James Woody Episcopal Church House Mount Saint Alban Washington, DC 20016	\$20,000
The Black Student Fund Ms. Jeannie Collins Carr 3636 16 th Street, NW, Fourth Floor Washington, DC 20010	\$10,000
Bread for the City George A. Jones, Executive Director 1525 Seventh Street, NW Washington, DC 20001	\$1,000
Camp Holiday Trails Ms. Tina LaRoche, Executive Director 400 Holiday Trails Lane Charlottesville, Va. 22903	\$5,000
Capital Area Food Bank Ms. Lynn Brantley, President & CEO 645 Taylor Street, NE Washington, DC 20017	\$1,000
Capital Partners for Education Mr. Khari Brown, Executive Director 1413 K Street, NW, Second Floor Washington, DC 20005	\$5,000
CASA Prince George's County, Inc. Ms. Ann Marie Binsner, Executive Director 6525 Belcrest Road, Suite G-55 Hyattsville, Maryland 20781	\$5,000

The Child Center and Adult Services, Inc. Nancy Ebb, JD, LCSW-C, Co-Director 16220 Frederick Road, Suite 502 Gaithersburg, MD 20877	\$5,000
Children's Inn at NIH Ms. Kathy L. Russell, Chief Executive Officer 7 West Drive Bethesda, Maryland 20814	\$5,200
Chillum Youth Project Mr. Joseph Emmerich P.O. Box 57 Hyattsville, Maryland 20781	\$10,000
Columbia Lighthouse for the Blind Mr. Anthony Cancelosi, President & CEO 1129 20 th Street, NW, Suite 750 South Washington, DC 20036	\$5,000
Community Lodgings, Inc Ms. Bonnie Baxley, Executive Director. 3912 Elbert Avenue, Suite 108 Alexandria, VA 22305	\$5,000
Corcoran Gallery of Art Mr. Sam Sweet, Chief Operating Officer 500 Seventeenth Street, NW Washington, DC 20006	\$5,000
Crossway Community, Inc Ms. Kathleen Guinan, Chief Executive Officer 3015 Upton Drive Kensington, MD 20895	\$5,000
Crossway Community, Inc Ms. Kathleen Guinan, Chief Executive Officer 3015 Upton Drive Kensington, MD 20895	\$1,000
DANCE Place Ms. Carla Perlo, Founder/Director 3225 8 th Street, NE Washington, DC 20017	\$4,500

DC Toys for Tots Master Sgt. Tim Butler 190 Poremba Court, SW, Suite 110 Washington, DC 20373	\$1,000
Dumbarton Concerts/Inner City-Inner Child Ms. Connie Zimmer, Executive Director 3133 Dumbarton Street, NW Washington, DC 20007	\$5,000
Easter Seals Virginia Ms. Tara Hazelbaker, CPA, President/CEO Easter Seals Virginia 8003 Franklin Farms Drive, Suite 100 Richmond, Virginia 23229	\$5,000
Fairfax County Park Authority Ms. Sousan Frankeberger, Events and Volunteer Coordinator 12055 Government Center Parkway, Suite 297 Fairfax, Virginia 22035-1118	\$5,440
Family Support Center Ms. Lori Goodman, LCSW, BCD, Executive Director 4308 Montgomery Avenue Bethesda, MD 20814	\$5,000
For Love of Children Mr. Tim Payne, Executive Director 1763 Columbia Road, NW Washington, DC 20009	\$5,000
Georgetown Visitation Preparatory School Mr. Daniel M. Kerns, Jr., Head of School 1524 Thirty-fifth Street, NW Washington, DC 20007	\$10,000
Girl Scout Council of the Nation's Capital Ms. Jan Verhage, Executive Director 4301 Connecticut Avenue, NW, Suite M-2 Washington, DC 20008	\$5,000

Higher Achievement Program Ms. Lynsey Wood Jeffries Executive Director DC Metro 317 8 th Street, NE Washington, DC 20002-6107	\$15,000
The Holton-Arms School Ms. Susanna A. Jones, Head of School 7303 River Road Bethesda, Maryland 20817	\$10,000
House of Ruth Christel Nichols, President 5 Thomas Circle, NW Washington, DC 20005	\$1,000
HSC Pediatric Center Mr. Bruce Goldman 1731 Bunker Hill Rd NE Washington, DC 20017	\$1,000
Joy of Motion Dance Center Mr. Douglas E. Yeuell, Executive/Artistic Director 2201 Wisconsin Avenue, NW, Suite 130 Washington, DC 20007	\$5,000
Jubilee Jumpstart Ms. Jessica Panfil, Executive Director P.O. Box 21097 Washington, DC 20009	\$10,000
Landon School Mr. David M. Armstrong, Headmaster 6101 Wilson Lane Bethesda, Maryland 20817-3199	\$10,000
Landon School Mr. David M. Armstrong, Headmaster 6101 Wilson Lane Bethesda, Maryland 20817-3199	\$25,000

Levine School of Music Mr. Peter Jablow, President & CEO Sallie Mae Hall 2801 Upton Street, NW Washington, DC 20008	\$5,000
Lutheran Social Services of the National Capital Area Ms. Melissa Graves, Chief Executive Officer 4406 Georgia Avenue, NW Washington, DC 20011-7124	\$5,000
The Madeira School Dr. Elisabeth Griffith, Headmistress 8328 Georgetown Pike McLean, Virginia 22102	\$10,000
Martha's Table Lindsey Buss, President 2114 14th Street NW Washington, D.C. 20009	\$1,000
Montgomery Hospice Foundation Ms. Ann Mitchell, MPH, President and CEO 1335 Piccard Drive, Suite 100 Rockville, Maryland 2085	\$7,500
N Street Village Mary Funke, Executive Director 1333 N Street, NW Washington, DC 20005	\$1,000
National Cathedral School Mrs. Kathleen O'Neill Jamieson, Head of School Mount Saint Alban Washington, DC 20016	\$10,000
Poor Robert's Charities Mr. Robert Abbo 3900-B Watson Place, NW, Apt. G2A Washington, DC 20016	\$5,000
Potomac Community Resources, Inc. Mr. Stephen Riley, Executive Director 9200 Kentsdale Drive Potomac, Maryland 20854	\$1,720

Prince George's Child Resource Center, Inc. Ms. Marti Worshtil, Executive Director 9475 Lottsford Road, Suite 202 Largo, Maryland 20774-5357	\$6,000
Prince George's Community College Dr. Paul Hahn, Director Children's Developmental Clinic 301 Largo Road Largo, Maryland 20774-2199	\$3,000
Rosemount Center Mr. Jacques Rondeau 2000 Rosemount Ave, NW Washington, DC 20010	\$1,000
St. Ann's Infant and Maternity Home Sister Mary Bader, Chief Executive Officer 4901 Eastern Avenue Hyattsville, Maryland 20872	\$1,000
St. Gabriel's Church The Reverend Agustin Mateo-Ayala 28 Grant Circle, NW Washington, DC 20011	\$5,000
Salvation Army National Capital Area Major Steve Morris, Area Commander Divisional Headquarters 2626 Pennsylvania Avenue Washington, D.C. 20037	\$1,000
SOME (So Others Might Eat) Fr. John Adams, President 71 'O' Street, NW Washington, DC 20001	\$1,000
Stone Ridge School of the Sacred Heart Mrs. Catherine Ronan Karrels, Head of School 9101 Rockville Pike Bethesda, MD 20814	\$10,000

The Studio Theatre Ms. Joy Zinoman, Founding Artistic Director 1501 Fifteenth Street, NW Washington, DC 20005	\$5,000
Washington Middle School for Girls Sister Mary Bourdon, RJM THEARC 1901 Mississippi Avenue, SE Washington, DC 20020	\$5,000
Washington Tennis & Education Foundation Ms. Eleni A. Rossides, Executive Director The William H.G. Fitzgerald Tennis Center 16 th and Kennedy Streets, NW Washington, DC 20011	\$5,000
A Wider Circle Mark Bergel, Ph.D, Executive Director 4808 Moorland Lane, Suite 802 Bethesda, Maryland 20814	\$3,000
Youth Leadership Foundation Mr. Michael J. Barvick, Executive Director 5034 Wisconsin Avenue, Suite 250 Washington, DC 20016	\$10,000

TOTAL 2009 GRANTS - \$323,360

GEORGE PRESTON MARSHALL FOUNDATION

Suite 104
4300 Montgomery Avenue
Bethesda, Maryland 20814

(301) 654-7774

APPLICATION GUIDELINES AND PROCEDURES

The George Preston Marshall Foundation awards grants to non-profit organizations for programs which provide services to children of the greater Washington, D.C. area. Children are generally regarded to be persons 18 years or younger. Grants are authorized at meetings of the Foundation directors for periods of one year only.

Applications should be made in writing to the Foundation office at any time during the year. Meetings with Foundation staff and/or site visits may be scheduled. Consideration by the board will take place at the earliest possible board meeting. Grants are not awarded to individuals and are generally restricted to projects serving the greater Washington, D.C. area.

There is no required application form, however, the outline below indicates necessary information and a suggested format.

1. Cover letter requesting grant from chief operating officer of organization.
2. Summary page:
 - Purpose of the grant
 - Amount requested
 - Number of children served by the project
 - Contact person
3. Proposal (preferably not more than 5 pages):
 - Statement of need
 - Description of project
 - Methodology, goals, objectives, time-frame, etc.
 - Project budget
 - Background of organization
4. Tax ruling from the Internal Revenue Service
5. Current board of directors
6. Current budget for organization (if different from project budget)
7. Most recent audited financial statement
8. Any additional information or materials which would be helpful in evaluating the request.
9. Please send one copy of the full proposal.