Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, 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 MARCH FOUNDATION
Number and street (or P O box number if mail is not delivered to street address): C/O KENNETH B JARVIS PO BOX 261936
Room/suite:
City or town: PLANO State: TX ZIP code: 75026-1936

A Employer identification number: 23-7989378
B Telephone number (see the instructions): (972) 403-1907
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, column (c), line 16)* ► $ 557,975.

J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis)*

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc, received (att sch)	128,065.			
	2 Ck ► ☐ if the foundn is **not** req to att Sch B				
	3 Interest on savings and temporary cash investments	745.	745.		
	4 Dividends and interest from securities	12,143.	12,143.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(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/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	140,953.	12,888.		
OPERATING AND ADMINISTRATIVE EXPENSES	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) L-16b Stmt	500.	500.		
	c Other prof fees (attach sch) L-16c Stmt	6,448.	6,448.		
	17 Interest				
	18 Taxes (attach schedule)(see instr) TAXES	1,016.			
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	7,480.			
	22 Printing and publications	3,957.			
	23 Other expenses (attach schedule) See Line 23 Stmt	4,567.			
	24 **Total operating and administrative expenses.** Add lines 13 through 23	23,968.	6,948.		
	25 Contributions, gifts, grants paid	45,725.			45,725.
	26 **Total expenses and disbursements.** Add lines 24 and 25	69,693.	6,948.		45,725.
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	71,260.			
	b **Net investment income** (if negative, enter -0-)		5,940.		
	c **Adjusted net income** (if negative, enter -0-)				

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Part II Balance Sheets — Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (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	26,811.	93,103.	93,103.
3 Accounts receivable ►			
Less: allowance for doubtful accounts ►			
4 Pledges receivable ►			
Less: allowance for doubtful accounts ►			
5 Grants receivable			
6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
7 Other notes and loans receivable (attach sch) ►			
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 (attach schedule)			
b Investments — corporate stock (attach schedule) L-10b Stmt	457,516.	464,872.	464,872.
c Investments — corporate bonds (attach schedule)			
11 Investments — land, buildings, and equipment basis ►			
Less accumulated depreciation (attach schedule) ►			
12 Investments — mortgage loans			
13 Investments — other (attach schedule)			
14 Land, buildings, and equipment. basis ►			
Less accumulated depreciation (attach schedule) ►			
15 Other assets (describe ►)			
16 **Total assets** (to be completed by all filers — see instructions Also, see page 1, item I)	484,327.	557,975.	557,975.
LIABILITIES 17 Accounts payable and accrued expenses			
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, & other disqualified persons			
21 Mortgages and other notes payable (attach schedule)			
22 Other liabilities (describe ►)	0.	0.	
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 ► [X] and complete lines 27 through 31.			
27 Capital stock, trust principal, or current funds	484,327.	557,975.	
28 Paid-in or capital surplus, or land, building, and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 **Total net assets or fund balances** (see the instructions)	484,327.	557,975.	
31 **Total liabilities and net assets/fund balances** (see the instructions)	484,327.	557,975.	

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	484,327.
2	Enter amount from Part I, line 27a	2	71,260.
3	Other increases not included in line 2 (itemize) ► ERROR ADJUSTMENT	3	2,388.
4	Add lines 1, 2, and 3	4	557,975.
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	557,975.

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 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a	1064.8590 SHRS WHG CAMBIAR OPPY FD	P	01/31/08	01/30/09
b	1114.27 SHRS BLACKROCK LGE CAP VAL FD	P	01/31/08	01/30/09
c	927.577 SHRS COLUMBIA MARSICO 21ST CENT-A	P	01/31/08	01/30/09
d	780.744 SHRS FMI FUNDS FOCUS FD	P	01/31/08	01/30/09
e	See Columns (a) thru (d)			

	(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	10,904.		19,157.	-8,253.
b	12,134.		19,065.	-6,931.
c	7,346.		14,322.	-6,976.
d	11,727.		22,915.	-11,188.
e	See Columns (e) thru (h)		413,266.	-101,130.

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

	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a				-8,253.
b				-6,931.
c				-6,976.
d				-11,188.
e	See Columns (i) thru (l)			-101,130.

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** -134,478.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).

If gain, also enter in Part I, line 8, column (c) (see the instructions) 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 the 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 (column (b) divided by column (c))
2008		429,055.	
2007	62,860.	408,822.	0.153759
2006	34,881.	325,642.	0.107115
2005	3,808.	246,879.	0.015425
2004	3,395.	213,430.	0.015907

2	**Total** of line 1, column (d)	2	0.292206
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	0.073052
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	436,848.
5	Multiply line 4 by line 3	5	31,913.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	59.
7	Add lines 5 and 6	7	31,972.
8	Enter qualifying distributions from Part XII, line 4	8	45,725.

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 the instructions)

1 a	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 instr.)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► [X] and enter 1% of Part I, line 27b		1	59.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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	59.
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	59.
6	Credits/Payments			
a	2009 estimated tax pmts 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	
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	59.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ►		10	0.
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ► **Refunded** ►		11	

Part VII-A Statements Regarding Activities

			Yes	No
1 a	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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1b		X
	*If the answer is 'Yes' to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ► $ ________ **(2)** On foundation managers ► $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If 'Yes,' attach a detailed description of the activities*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If 'Yes,' has it filed a tax return on **Form 990-T** for this year?	4b		X
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If 'Yes,' attach the statement required by General Instruction T.*	5		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?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If 'Yes,' complete Part II, column (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see the instructions) ► TX - Texas			
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*	8b		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*	9		X
10	Did any persons become substantial contributors during the tax year? *If 'Yes,' attach a schedule listing their names and addresses*	10		X

Part VII-A | Statements Regarding Activities *Continued*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	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 ► www.marchfoundation.com

14 The books are in care of ► NORMAN E. CARMICHAEL Telephone no. ► (770) 998-7764

Located at ► 4025 HEATHERWOOD WAY ROSWELL GA ZIP + 4 ► 30075

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

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
1 a	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 the instructions)?	1 b		
	Organizations relying on a current notice regarding disaster assistance check here ► ☐			
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?	1 c		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 ► 20__ , 20__ , 20__ , 20__ .			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer 'No' and attach statement – see the instructions.)	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 ► 20__ , 20__ , 20__ , 20__ .			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ 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.)*	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

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)? (see instructions) ☐ 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)? **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? ☐ 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** No: 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? **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 (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation **(If not paid, enter -0-)**	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JAMES E CASTILLO JR	MANAGING TRUSTEE 3.00	0.	0.	0.
KENNETH B JARVIS	TRUSTEE 3.00	0.	0.	0.
WILLIAM H LEWIS	TRUSTEE 1.00	0.	0.	0.
See Information about Officers, Directors, Trustees, Etc.		0.	0.	0.

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

(a) Name and address of each employee paid more than $50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
0				
0				
0				
0				
Total number of other employees paid over $50,000 ►				None

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

3 Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE.'

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

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	0.
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	0.
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ►	None

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**	375,122.
b Average of monthly cash balances		**1b**	68,379.
c Fair market value of all other assets (see instructions)		**1c**	
d Total (add lines 1a, b, and c)		**1d**	443,501.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	**1e**		
2 Acquisition indebtedness applicable to line 1 assets		**2**	
3 Subtract line 2 from line 1d		**3**	443,501.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)		**4**	6,653.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4		**5**	436,848.
6 Minimum investment return. Enter 5% of line 5		**6**	21,842.

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**	21,842.
2a Tax on investment income for 2009 from Part VI, line 5	**2a**	59.		
b Income tax for 2009. (This does not include the tax from Part VI)	**2b**			
c Add lines 2a and 2b			**2c**	59.
3 Distributable amount before adjustments. Subtract line 2c from line 1			**3**	21,783.
4 Recoveries of amounts treated as qualifying distributions			**4**	
5 Add lines 3 and 4			**5**	21,783.
6 Deduction from distributable amount (see instructions)			**6**	
7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1			**7**	21,783.

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**	45,725.
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**	45,725.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	**5**	59.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	**6**	45,666.

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					21,783.
2 Undistributed income, if any, as of the end of 2009					
a Enter amount for 2008 only				20,437.	
b Total for prior years 20___, 20___, 20___					
3 Excess distributions carryover, if any, to 2009					
a From 2004	3,395.				
b From 2005	3,808.				
c From 2006	35,000.				
d From 2007	63,000.				
e From 2008	56,864.				
f **Total** of lines 3a through e		162,067.			
4 Qualifying distributions for 2009 from Part XII, line 4 ► $ 45,725.					
a Applied to 2008, but not more than line 2a					
b Applied to undistributed income of prior years (Election required – see instructions)					
c Treated as distributions out of corpus (Election required – see instructions)					
d Applied to 2009 distributable amount					
e Remaining amount distributed out of corpus		45,725.			
5 Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*					
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		207,792.			
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					
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 instructions				20,437.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010					21,783.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)					
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)		3,395.			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a		204,397.			
10 Analysis of line 9.					
a Excess from 2005	3,808.				
b Excess from 2006	35,000.				
c Excess from 2007	63,000.				
d Excess from 2008	56,864.				
e Excess from 2009	45,725.				

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)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 organization had $5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

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

KENNETH B. JARVIS

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:

See Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs

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

c Any submission deadlines:

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

Part 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*				
NATIONAL MINORITY JUNIOR GOLF SCHOLARSHIP ASSOC INC, PHOENIX AZ 85034	N/A	PUBLIC	GENERAL	1,500.
WALTER G HOOK SCHOLARSHIP FUND OF XAVIER UNIV NEW ORLEANS LA 70125	N/A	PUBLIC	GENERAL	5,000.
THE SPONSORS 6001 ANDOVER DR, NASHVILLE TN 37215	N/A	PUBLIC	GENERAL	10,000.
SAVANNAH STATE UNIVERSITY SCHOLARS SAVANNAH GA 31404	N/A	PUBLIC	GENERAL	10,000.
PINEY WOODS SCHOLARSHIP 5046 HWY 49 SOUTH PINEY WOODS MS 39148	N/A	PUBLIC	GENERAL	10,000.
LEGACY LADIES 6709 LA TIJERA BLVD #555 LOS ANGELES CA 90045	N/A	PUBLIC	GENERAL	5,000.
NATIONAL URBAN LEAGUE 120 WALL ST 8TH FLOOR NEW YORK NY 10005	N/A	PUBLIC	GENERAL	4,225.
Total			► **3a**	45,725.
***b** Approved for future payment*				
Total			► **3b**	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (see the instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	745.	
4 Dividends and interest from securities			14	12,143.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				12,888.	

13 **Total.** Add line 12, columns (b), (d), and (e) 13 12,888.

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

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See the instructions.)
N/A	

Part XVII 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	**1a(1)**		X
(2) Other assets	**1a(2)**		X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	**1b(1)**		X
(2) Purchases of assets from a noncharitable exempt organization	**1b(2)**		X
(3) Rental of facilities, equipment, or other assets	**1b(3)**		X
(4) Reimbursement arrangements	**1b(4)**		X
(5) Loans or loan guarantees	**1b(5)**		X
(6) Performance of services or membership or fundraising solicitations	**1b(6)**		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	**1c**		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.

(a) Line no.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

SIGN HERE

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.

► Norman E. [signature] | 5/4/10 | ► TREASURER

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only			
Preparer's signature ► R. E. Dais	Date 04/28/10	Check if self-employed ► ☐	Preparer's Identifying number (See **Signature** in the instrs) P00200296
Firm's name (or yours if self employed), address, and ZIP code ► TPI & ASSOCIATES LLC		EIN ► 36-4587691	
5930 LBJ FRWY STE 401			
DALLAS TX 75240-6360		Phone no ► (972) 490-5275	

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 MARCH FOUNDATION	23-7989378

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)/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 their 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)

Name of organization: THE MARCH FOUNDATION

Employer identification number: 23-7989378

Part I **Contributors** (see instructions.)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	H KAY & KENNETH B JARVIS FDN	$ 10,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
2	KENNETH D PARKS	$ 2,665.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
3	CGF DOUGLAS & BETTY SMALLS FUND	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
4	JAMES CASTILLO	$ 18,101.	Person [X] Payroll [ ] Noncash [X] (Complete Part II if there is a noncash contribution.)
5	MEL SMITH	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
6	DENNIS OBREGON	$ 7,625.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

Name of organization: THE MARCH FOUNDATION

Employer identification number: 23-7989378

Part I Contributors (see instructions.)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
7	HENRY SHORT	$ 6,125.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
8	WILLIAM H LEWIS	$ 5,125.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
9	THE ARTHUR & PATRICIA HILL FDN	$ 26,229.	Person [X] Payroll [ ] Noncash [X] (Complete Part II if there is a noncash contribution.)
10	HAZEL M PIERCE	$ 10,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
11	JAMES WINESTOCK	$ 2,625.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
12	ELZE EPPS	$ 2,880.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

Name of organization: THE MARCH FOUNDATION

Employer identification number: 23-7989378

Part I **Contributors** (see instructions.)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
13	DON WOFFORD	$ 6,130.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
14	NORMAN E CARMICHAEL	$ 3,125.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
15	KEITH JONES	$ 2,625.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
16	GARRETT WILSON	$ 2,625.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
17	DARRELL CLAY	$ 3,500.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
18	BRUCE TROTTER	$ 2,625.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

Name of organization	Employer identification number
THE MARCH FOUNDATION	23-7989378

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
4	317 SHRS UNITED PARCEL SERVICE	$ 18,101.	10/23/09
9	555 SHRS UNITED PARCEL SERVICE	$ 26,229.	02/10/09
		$	
		$	
		$	
		$	

THE MARCH FOUNDATION
EIN: 237989378
FORM 990-PF, 01/01/09 - 12/31/09

Month	No. of Shares	Value Beg. Of Month	End of Month Price	Value End of Month	Average Value for Month
January	24860 983	$ 309,089 06	$ 12 43	$ 292,252 44	$ 300,670 75
February	34917.134	$ 292,252.44	$ 8 37	$ 299,829 04	$ 296,040.74
March	34917 134	$ 299,829.04	$ 8 59	$ 320,763 73	$ 310,296 39
April	34362 134	$ 320,763.73	$ 9.33	$ 323,372 04	$ 322,067 89
May	37537.138	$ 323,372 04	$ 8.61	$ 376,559 20	$ 349,965 62
June	37537.138	$ 376,559 20	$ 10 03	$ 376,768.61	$ 376,663 91
July	37383.532	$ 376,768.61	$ 10 08	$ 401,918 62	$ 389,343 62
August	38383 532	$ 401,918 62	$ 10.47	$ 414,034.60	$ 407,976 61
September	37383.532	$ 414,034 60	$ 11.08	$ 430,632 08	$ 422,333 34
October	37597.988	$ 430,632 08	$ 11 45	$ 420,287 18	$ 425,459 63
November	39377 142	$ 420,287 18	$ 10 67	$ 458,060 45	$ 439,173.82
December	39377 142	$ 458,060 45	$ 11.63	$ 464,872 23	$ 461,466 34

Average Monthly Balance for 2009 $ 375,121 55

Month	Security Portfilio Cash	Bank Accounts Cash	Total Cash Balance
January	$ 28,836.72	$ 51,116.80	$ 79,953.52
February	$ 22,391 55	$ 50,022 76	$ 72,414.31
March	$ 22,998.64	$ 47,941.17	$ 70,939.81
April	$ 52,531.51	$ 45,517.81	$ 98,049.32
May	$ 19,907.02	$ 38,362.29	$ 58,269.31
June	$ 20,250 48	$ 35,978.16	$ 56,228.64
July	$ 21,239 55	$ 40,978 49	$ 62,218 04
August	$ 21,285 86	$ 12,538 37	$ 33,824 23
September	$ 21,744.04	$ 10,038 76	$ 31,782 80
October	$ 41,407.50	$ 48,147 35	$ 89,554 85
November	$ 19,469 46	$ 54,744.39	$ 74,213 85
December	$ 22,055.62	$ 71,046 89	$ 93,102 51

Average Monthly Cash Balance $ 68,379.27

Additional Information

ADDRESSES OF OFFICERS, DIRECTORS AND SCHEDULE B DONORS

THE ADDRESSES OF THE OFFICERS, DIRECTORS AND SCHEDULE B DONORS ARE AVAILABLE UPON REQUEST.
SUCH INFORMATION IS NOT SHOWN DUE TO PRIVACY CONCERNS.

Form 990-PF, Page 1, Part I, Line 23
Line 23 Stmt

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
BOARD INSURANCE EXPENSE	698.			
INVESTMENT EXPENSE	6,448.			
MISCELLANEOUS	616.			
POSTAGE & SHIPPING	108.			
WEBSITE DEV & MTCE	3,145.			
Total	11,015.			

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
Columns (a) thru (d)

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)	**(b)** How acquired P-Purchase D-Donation	**(c)** Date acquired (month, day, year)	**(d)** Date sold (month, day, year)
2356.283 SHRS OAKMARK INTL FD	P	01/31/08	01/30/09
1034.998 SHRS JANUS MID CAP VAL FD	P	01/31/08	01/30/09
1109.111 SHRS ARTIO INTL EQ FD	P	01/31/08	01/30/09
676.069 SHRS KINETICS MUT FDS INC	P	01/31/08	01/30/09
441.827 SHRS LEGG MASON VAL TRUST INSTL	P	01/31/08	01/30/09
4768.17 SHRS PIMCO FDS PAC INVT MGMT SER	P	01/31/08	01/30/09
258.632 SHRS RS GLOBAL NAT RES FD	P	01/31/08	01/30/09
594.745 SHRS T ROWE PRICE MID CAP GWT RD	P	01/31/08	01/30/09
1149.098 SHRS ROYCE PREMIER FD	P	01/31/08	01/30/09
814.663 SHRS TCW GALILEO FDS INC	P	01/31/08	01/30/09
73.0 SHRS UNITED PARCEL SERVICE	D	06/19/08	01/30/09
6215.602 SHRS WESTERN ASSET CORE BOND PORT	P	01/31/08	01/30/09
19.663 SHRS FIDELITY ADV LEVRGD COMPNY	P	01/30/08	05/12/09
29.661 SHRS MGR EMERG MKTS EQ FD	P	01/30/09	05/12/09
1766.013 SHRS WESTERN ASSET CORE PLUS	P	01/30/09	05/12/09
35.598 SHRS ALLIANCEBERNSTEIN INT VAL	P	05/12/09	07/22/09
22.433 SHRS ARTIO INTL EQUITY II	P	05/12/09	07/22/09
12.59 SHRS BRANDYWINE BLUE FD	P	01/30/09	07/22/09
56.35 SHRS EATON VANCE INC FD OF BOSTON	P	05/12/09	07/22/09
34.29 SHRS HARBOR FD INTL GWTH FD	P	05/12/09	07/22/09
3.971 SHRS HARTFORD CAP APPREC	P	01/30/09	07/22/09
12.762 SHRS MANAGERS TIMESSQ M/C GRW	P	05/12/09	07/22/09
27.83 SHRS MGRS EMERG MKTS EQ RD	P	01/30/09	07/22/09
99.466 SHRS WELLS FARGO ADV END SEL FD	P	05/12/09	07/22/09
101.386 SHRS ALLIANCEBERNSTEIN INT VAL	P	05/12/09	10/22/09
74.268 SHRS ARTISAN SM CAP VAL FD	P	05/12/09	10/22/09
77.474 SHRS ARTIO INTL EQ II	P	05/12/09	10/22/09
26.984 SHRS BLACKROCK MCR CP EQ INST	P	05/12/09	10/22/09
39.872 SHRS FIDELITY ADV LEVRGD CO	P	01/30/09	10/22/09
150.242 SHRS JOHN HANCOCK CL VAL	P	05/12/09	10/22/09
52.642 SHRS HARBOR FD INTL GWTH FD	P	01/30/09	10/22/09
9.06 SHRS HARTFORD CAP APPREC	P	01/30/09	10/22/09
16.997 SHRS MANAGERS TIMESSQ M/C	P	05/12/09	10/22/09
18.653 SHRS MANAGERS EMERG MKTS EQ	P	01/30/09	10/22/09
62.02 SHRS RS VALUE FD CL Y	P	05/12/09	10/22/09
555 SHRS UNITED PARCEL SERVICE	D	02/10/09	10/23/09
317 SHRS UNITED PARCEL SERVICE	D	10/23/09	10/23/09

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
Columns (e) thru (h)

(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)
23,280.		45,830.	-22,550.
14,759.		22,915.	-8,156.
24,079.		45,008.	-20,929.
8,958.		19,065.	-10,107.
12,217.		28,644.	-16,427.
48,397.		52,450.	-4,053.
5,010.		9,166.	-4,156.
18,734.		31,361.	-12,627.
13,042.		18,983.	-5,941.
8,147.		14,322.	-6,175.
3,188.		4,803.	-1,615.
55,381.		68,745.	-13,364.
412.		328.	84.
291.		219.	72.
16,071.		15,223.	848.
423.		392.	31.
238.		222.	16.
246.		236.	10.
277.		259.	18.
333.		283.	50.
102.		78.	24.
127.		118.	9.
308.		205.	103.
711.		652.	59.
1,472.		937.	535.
1,049.		737.	312.
984.		768.	216.
900.		710.	190.
1,106.		664.	442.
2,225.		1,530.	695.
602.		391.	211.
269.		179.	90.
194.		157.	37.
248.		137.	111.
1,286.		1,003.	283.
29,436.		26,229.	3,207.
17,634.		317.	17,317.
Total		413,266.	-101,130.

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income
Columns (i) thru (l)

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (column (h) gain minus column (k), but not less than -0-) or losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
			-22,550.
			-8,156.
			-20,929.
			-10,107.

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income Continued
Columns (i) thru (l)

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (column (h) gain minus column (k), but not less than -0-) or losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
			-16,427.
			-4,053.
			-4,156.
			-12,627.
			-5,941.
			-6,175.
			-1,615.
			-13,364.
			84.
			72.
			848.
			31.
			16.
			10.
			18.
			50.
			24.
			9.
			103.
			59.
			535.
			312.
			216.
			190.
			442.
			695.
			211.
			90.
			37.
			111.
			283.
			3,207.
			17,317.
Total			-101,130.

Form 990-PF, Page 6, Part VIII, Line 1
Information about Officers, Directors, Trustees, Etc.

(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
Person [X] Business [ ] ARTHUR B HILL	CMANAGING TRUSTEE 0.00	0.	0.	0.

Form 990-PF, Page 6, Part VIII, Line 1 Continued

Information about Officers, Directors, Trustees, Etc.

(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
Person [X] Business [ ] KENNETH D PARKS	TRUSTEE 3.00	0.	0.	0.
Person [X] Business [ ] DOUGLAS T SMALLS	TRUSTEE 1.00	0.	0.	0.
Person [X] Business [ ] JAMES WINESTOCK	TRUSTEE 1.00	0.	0.	0.
Person [X] Business [ ] NORMAN CARMICHAEL	TREASURER 3.00	0.	0.	0.
Person [X] Business [ ] ~~MEDFORD TURRENTINE~~ Don Wofford	SECRETARY 2.00	0.	0.	0.
Person [X] Business [ ] JAMES E CASTILLO, JR,	TRUSTEE 3.00	0.	0.	0.
Person [X] Business [ ]				
Total		0.	0.	0.

Form 990-PF, Page 10, Part XV, Line 2
Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs

Name KENNETH B. JARVIS, MANAGING TRUSTEE, C/O THE MARCH FOUNDATION
Address P.O. BOX 261936
City, St, Zip, Phone PLANO TX 75026-1936 (972) 403-1907

The form in which applications should be submitted and information and materials they should include:
THE FOUNDATION HAS NO REQUIRED FORM.

Any submission deadlines:
NONE

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
NO RESTRICTIONS OR LIMITATIONS ON AWARDS

Name
Address
City, St, Zip, Phone

The form in which applications should be submitted and information and materials they should include.
ALL FORMS & INFORMATION DEEMED APPROPRIATE SHOULD BE SUBMITTED.

Any submission deadlines:
NONE

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
NO RESTRICTIONS OR LIMITATIONS ON AWARD EXCEPT THEY MUST BE FOR QUALIFIED PURPOSES.

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

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TPI & ASSOCIATES LLC	PREPARATION OF FORM 99	500.			
Total		500.			

Form 990-PF, Page 1, Part I
Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
WACHOVIA TRUST	INVESTMENT ADVICE	6,448.			
Total		6,448.			

Form 990-PF, Page 2, Part II, Line 10b
L-10b Stmt

Line 10b - Investments - Corporate Stock:	End of Year Book Value	End of Year Fair Market Value
39377.142 SHRS MUTUAL FUNDS	464,872.	464,872.
Total	464,872.	464,872.