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| CI | SD | L'HV: | 32R | | | _ | | | | | | | |
|--|-----|---------------------------|--|---------------------|------------------|---------------------------------------|-------------------------------|-------------|-----------------|--------------|----------|---|---|
| <u> </u> | | m 990 | | | | | tum of on 4947(a)(| | | | _ | ~~~\~ | OMB No. 1545-0052 |
| <u></u> | Dec | estment of the | Transport | | | | Treated as | s a Priva | te Founds | rtion | 0 | W 11 | 2009 |
| | _ | mal Personal | Vear 2009, or | | | | be able to use | | | | | | |
| | _ | Check all t | | | intial retur | | | | lormer public o | | DEC | 31, 2009 | |
| | • | CHOCK CO. | and athlia. | | Amended | | | Address cha | | I ELITED | Name cha | Li Final returi ence | • |
| PANTELINE SOLIE | Ut | e the IRS | Name of tou | ndation | | | | | | | | yer identification | n aumber |
| MAY | 01 | label. Berwise, | THE MA | RCUS | FOUN | DATION | ī | | | | 26 | -3610094 | <u>l</u> |
| ₩. | | priet er type . | | - | | | elivered to street a | ddrafs) | | Piourn/suite | 1 . | one number | |
| 0_ | Se | Specific | 250 JA. City or town, | SMIN | NE STR | KET | | | | | | 03) 908- | |
| 9 | las | tructions | DENVER | CC | 802 | 20 | | | | | | kion application la s sign organization: | ending, check here |
| 2010 | H | Check type | of organization | on: | X Section | n 501(c)(3) e | cempt private to | Rundation | | | 2. Form | gn organizations ma k here and attach or | esting the 85% to |
| 1 | | | 4947(a)(1) n | | | | Other taxable p | | | | ı | | lus was terminated |
| | | | | | and of year | | ing method; ther (specify) | LX Cash | L Accr | rai List | ł | | (A), check here . 🕨 📖 |
| | | rom rent ⊳\$ | H, cal. (c), lin 1. | | .657. | | mn (d) must b | e on cash | basis.) | | | | 50-month termination (B), check here ► |
| | | art II As | alvala of Revi | | d Expenses | | (a) Reven | ue and | (b) Net inv | estment | | djusted net | (d) Digburgements |
| | | | total of emount moorry equal th | | | | expenses | | inco | me | | Income | for chartsbie purposes (cash basis only) |
| | | 1 | tributions, giff | . • | | | $\frac{1,173}{1}$ | ,112. | | | 1 | I/A | ļ <u> </u> |
| | | i a Intere | k Den sivings a | nd tempo | rairy | attach Sch. 8 | ļ | | | | | | |
| | | | investments dends and inte | erest from | | | 3 | .063. | | 3.063. | | | STATEMENT 1 |
| | | | se rents | | | | | | | | | J | |
| | | D Net re | entel income or (| (000) | | | | | | | | HE! | FIVED |
| | 3 | Bà Net o | pin or (Lose) from sealed original | n maio ca' a mai | innets not on il | , 283. | 102 | ,167. | | | | | |
| | ş | | s estes price for a s on line da al gain net incon | | | | | | 102 | ,167. | | MAY | 1 2010 19 |
| | 8 | | hort-term cap | | | ··· ···· | | | | ., 20, . | | - | (2) |
| | i | 9 Incor | me modificatio | ons . | | | | | | | | OGD | EN. UT |
| · | | 10a and a | andre lyst robin Bowences. | · | | | | | | | | | |
| | | | Cost of goods s | | | | | | | | | | |
| | | # Gross | s profit or (los r income | is) | ••••• | | | | | | | | |
| | | 12 Total | L Add lines 1 | ttrough | | | 1,278 | .342. | 105 | .230 | | | |
| | | | erection of offic | | | | | 0. | | 0. | | | 0. |
| | | 14 Other | employee sai | lanes an | d wages | | | | | | | | |
| | | | ion plans, emp | | | | | | | | | | |
| | ğ | | fees unting fees | ••• •••• | | | | | | | | | |
| | ğ | | professional | | | F | | | | | | | |
| | | | | | | | | | | | | | |
| | B | 18 Taxes | st | ••••• | ST | @T.2 [| | 39. | | 39. | | | 0. |
| \ <u>\&</u> | 퓔 | 19 Depre | eciation and de | epletion | | l | | | | | | | |
| A | ş | 20 Occup | pancy L, conferences | | | } | | | | | | | |
| 2 | ğ | 22 Prints | ng and public | n anu (() ations | cum | · · · · · · | | | | | | | |
| SCANNED JU | 8 | 28 Other | expenses . | | STR | TT 3 | | 531. | | 36. | | | 495. |
| | | 24 Total | Operating an | d admin | istrative | · · · · · · · · · · · · · · · · · · · | | | | | | | |
| | | | sses. Add line | | | | | 570. | <u></u> | 75. | | | 495. 15,250. |
| ı | ~ | 25 Contri | ibutions, gifts, | grants | paid | L | 15 | ,250. | | | | | 15,250. |

15,820.

1,262,522.

75.

N/A

105,155.

02-02-10 LHA For Privacy Ast and Paperwork Reduction Act Notice, see the (astractions.

25 Contributions, gifts, grants paid 26 Total expenses and disbursements.

Add lines 24 and 25

b Net investment income of negative, order -0-1

c Adjusted net income or negative, enter -0-).

27 Subtract line 26 from line 12:

1 6 2010

Form **990-PF** (2009)

15,745.

6-17

| orm 990-PF (2009) THE MARCUS FOUNDATION | Darlest and an | | 3610094 Page |
|--|---|----------------|-----------------------|
| Part II Balance Sheets Attached actorists and amounts in the description column should be for and of your amounts only | Beginning of year | End or | |
| 1 Cook and the sealth and | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| 1 Cash - non-interest-bearing | | 35,493. | 35,493 |
| 2 Savings and temporary cash investments | | 386. | 386 |
| 8 Accounts receivable | | | |
| Less; allowance for doubtful accounts | | | |
| 4 Pledges receivable ▶ | | | |
| Less: allowance for doubtful accounts | | | |
| 5 Grants receivable | | | |
| 8 Receivables due from officers, directors, trustees, and other | İ | | |
| disqualified persons | | | |
| 7 Other notes and tozos recelhable | } | ł | |
| Less; allowance for doubtful accounts | | } | |
| 8 Inventories for sale or use | | | |
| Prepaid expenses and deferred charges | | | |
| 10a Investments - U.S. and state government obligations | | | |
| b investments - corporate stock | | | |
| e Investments - corporate bonds | | | |
| 11 trustmans - and, buildings, and equipment basis | | ĺ | |
| Less acceptualited depreciation | | | |
| 12 Investments - montgage loans | | | |
| 19 Investments - other STMT 4 | 0. | 1,226,643. | 1,415,778. |
| 14 Land, buildings, and equipment basis | | | |
| Less access whited depreciptions | | | |
| 15 Other assets (describe ▶) | | | |
| | | | |
| 16 Yotal assets (to be completed by all filers) | 0. | 1,262,522. | 1,451,657. |
| 17 Accounts payable and accrued expenses | | | |
| 18 Grants payable | | | |
| 19 Deferred revenue | | | |
| 20 Louis from officers, directors, trustees, and other disqualitied persons | | | |
| 21 Mortgages and other notes payable | | | |
| 22 Other liabilities (describe >) | | | |
| | | | |
| 23 Total liabilities (add lines 17 through 22) Foundations that fellow SFAS 117, check here | 0. | 0. | |
| Foundations that fellow SFAS 117, check here | | | |
| and complete iliges 24 through 25 and lines 30 and 31. | 1 | | |
| 24 Unrestricted | | 1 | |
| 25 Temporarily restricted | | | |
| 26 Permanently restricted | | | |
| Foundations that do not follow SFAS 117, check here | | | |
| and complete lines 27 through 31. | | | |
| 27 Capital stock, trust principal, or current funds | 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 | 0. | 1,262,522. | |
| 30 Total net assets or fund balances | 0.1 | 1,262,522. | |
| | | | |
| 31 Total liabilities and net assets/fund balances | 0.1 | 1,262,522. | |
| | | | |
| ert III Analysis of Changes in Net Assets or Fund Bal | ances | | |
| Total net assets or fund balances at beginning of year - Part II, column (a), line 30 | | TT | |
| (must agree with end-of-year figure reported on prior year's return) | | 11 | Ω. |
| neer amount from Part I, line 27a | | | 1,262,522. |
| Other increases not included in line 2 (Itemize) | • | 3 | |
| | | | 1.262.522. |
| Add lines 1, 2, and 3 Decreases not included in line 2 (Itemize) | ····· | 5 | 1,202,342. |
| rotal net assets or fund balances at end of year (line 4 minus line 5) - Part II, colur | ma (h) line 30 | | 1,262,522. |
| from their gravers of imiting marginess of earn of Aest (miss 4 min 2) . Lett it comm | (U), HIE 3U | <u> 191.</u> | Form 990-PF (2009) |

Form 990-PF (2009)

| | MARCUS FOUNDATI | | nt Income | | | | 26-361 | 0094 | Page |
|--|--|----------------|---|----------------|--|-----------------|--|---------------------|-------------|
| | cribe the kind(s) of property sold (e.g archouse; or common stock, 200 size | | | (b) | low acquired - Purchase - Donation | (e) Dat (mo. | te acquired , day, yr.) | (d) Dat (mo., d: | |
| 18 | | | | †~~ | | | | | |
| • SEE ATTACHED | STATEMENTS | | | | | | | | |
| <u>c</u> | | | | | | | | | |
| 4 | | | | ↓ | | ļ | | | |
| | | | | <u> </u> | | L | | | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | | Cost or other basis Expense of sale | | | | Gain or (loss) us (f) minus (| | |
| | | | | | | | | | |
| <u> </u> | | | | _4 | | | | | |
| <u> </u> | | ļ | | | | | | | |
| t 527,283. | | | 762 44 | _ | | | | - 400 | 400 |
| | a day in advise (b) and award by | to foundate | 425,11 | 0.1 | | | | | ,167. |
| (I) F.M.V. as of 12/31/69 | ig gain in column (h) and owned by t (j) Adjusted basis as of 12/31/69 | (k) l | Excess of col. (i) er col. (j), if any | \dashv | | oL (k), but | (Col. (h) gain r i not less than s (from col. (h | -0-) or | |
| • | 85 01 123 1705 | - | a cor (i), ii aliy | -+ | | | | | |
| 6 | | | | -+ | | | | | |
| • | | | | | | | | | |
| • | | | | _ | | | | | |
| • | | | | \neg | | | | 102 | 167. |
| | ff gain, also enter | In Part L line | 9 7 | 7 | | | | | |
| Capital gain net income or (net car | | | | 儿 | 2 | | | 102, | 167. |
| 8 Net short-term capital gain or (los | s) as defined in sections 1222(5) and | d (6): | | | | | | | |
| If gain, also enter in Part 1, line 8, | column (c). | | | 11 | i | | | | |
| If (loss), enter -0- in Part I, line 8 Part V Qualification U | | | | Щ | 3 | | N/A | | |
| | | | | | | come | | - 5375 | |
| (For optional use by domestic private | foundations subject to the section 49 | 940(a) tax o | n net investment inc | ome.) | | | | N/A | |
| If section 4940(d)(2) applies, leave th | is part blank. | | | | | | | | |
| At a shadow day a day a shadow day | | | | | | | r | ~~ r | |
| Was the foundation liable for the secti | | | - | 007 | ··· · · · · · · | ··· | L | Yes [| No |
| | fy under section 4940(e). Do not com ach column for each year, see instruc | | | | | | | | |
| (A) | | Judita peror | · manding any comics | | | | | <u> </u> | |
| Base periód years Calendar year (or tax year beginnin | n in) Adjusted qualifying distri | ibutions | Net value of none | (e) charita | bie-use assets | . 1 | Distribut (col. (b) divid | ráπ ratio | e)) |
| 2008 | ¥, | | | | | | foor to) aire | | -), |
| 2007 | | | | | | + | | | |
| 2006 | | | | | | + | | | |
| 2005 | | | | | | -} | | | |
| 2004 | | | | | | | | | |
| | | | | | | _ | | | |
| Total of line 1, column (d) | | | | | | 1 2 | | | |
| | year base period - divide the total on | line 2 by 5. | or by the number of | vear: | | <u> </u> | | | |
| | ce if less than 5 years | | | | | 8 | | | |
| | use assets for 2009 from Part X, lin | | | | | | | | |
| EURI CIG INCLASTING OF INCHICUMINATING | -036 92367 for \$009 from Part V. 811 | | / | •••• | | 4 | | | |
| Multiply line 4 by line 3 | | | · · · · · · · · | <i>.</i> | | 5 | | | |
| Enter 1% of net investment income | (1% of Part I, line 27b) | | | | | 8 | | | |
| Add lines 5 and 6 | · · · · · · · · · · · · · · · · · · · | | | | | 7 | | | |
| Enter qualitying distributions from f | Part XIL line 4 | | | | | 8 | | | |
| | ne 7, check the box in Part VI, line 15 | | | | | لـــــــا | | | |
| See the Part VI instructions. | tion to proceed the DOY III Last At 818 15 | , and court | we ner bar navið s | . 170 L | an 1816. | | | | |
| 23521 (J2-02-10 | | | | | | | Form | 990-PF | (2009) |

923521 (2-02-10

| | m 990-FF (2009) THE MARCUS FOUNDATION | 26- | <u> 361</u> | 009 | 4 | Page |
|----------|---|---------------|--------------|----------------|-----------------|--|
| P | art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or | 4948 | - 500 | inst | ructi | ons) |
| 1 | la Exempt operating foundations described in section 4940(d)(2), check here ▶ and enter "N/A" on line 1. | T | | | | |
| • | Date of ruling or determination letter: (attack copy of letter if accessary-see instructions) | 1 | 1 | | | |
| | Domestic foundations that meet the section 4940(e) requirements in Part V, check here ■ and enter 1% | 1 | ì | | 2, | 103 |
| | of Part I, line 27b | | | | | |
| | e All other domestic foundations enter 2% of line 27b. Exampt foreign organizations enter 4% of Part I, line 12, col. (b) | i | ļ | | | |
| | ? Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, Others enter -0-) | 2 | 1 | | | 0 |
| | Add lines 1 and 2 | 3 | | | 2, | 103 |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable toundations only. Others enter -0-) | 4 | | | | 0 |
| | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter-0- | 5 | | | 2. | 103 |
| | Credits/Payments; | | | | | |
| | a 2009 estimated tax payments and 2009 overpayment credited to 2009 | 1 | 1 | | | |
| | Exempt foreign organizations - tax withheld at source | 1 | | | | |
| | e Tax paid with application for extension of time to file (Form 8868) 6c | 1 | l | | | |
| | d Backup withholding erroneously withheld | 1 1 | ĺ | | | |
| | Total cradite and nonmonte. Add lines to though tid | 1 7 | | | | 0. |
| | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached | - | | | | 35 |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | | 2. | 138 |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | | | | |
| | Enter the amount of line 10 to be: Credited to 2010 estimated tax | 11 | | | | |
| | art VII-A Statements Regarding Activities | | | | | |
| | During the tax year, did the foundation attempt to influence any national, state, or local tegistation or did it participate or intervene | in | | T | IVe: | 8 No |
| - | any political campaign? | | | 18 | ``` | X |
| | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? | | •••• | 16 | ╆ | 1 😾 |
| _ | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published | | • • • • • | " | ├─ | - |
| | distributed by the foundation in connection with the activities. | o ur | | 1 | ļ | į |
| | E Did the foundation file Form 1120-POL for this year? | | | 10 | 1 | x |
| 7 | f Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | • • • • • • • | | | - | +- |
| ٠ | (1) On the foundation. \blacktriangleright \$ 0 . (2) On foundation managers. \blacktriangleright \$ 0. | | | İ | 1 | 1 |
| | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation | | | l | l | 1 |
| • | managers. > \$ | | | 1 | 1 | 1 |
| , | Has the foundation engaged in any activities that have not previously been reported to the IRS? | | | 2 | 1 | x |
| _ | If "Yes," attach a detailed description of the activities. | | | ├ ∸ | | - |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or | r | | ĺ | ł | |
| • | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | | 3 | ľ | x |
| 4. | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | • | 48 | | X |
| - | If Yes, has it filed a tax return on Form 999-T for this year? | N/ | 'A" | 40 | _ | ┼ <u>~</u> ~ |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | .22 | 5 | | X |
| | If "Yes," attach the statement required by General instruction T. | | · • | - | | |
| | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: | | | | | |
| • | By tanguage in the governing instrument, or | | | | |) |
| | By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state | la me | | | | |
| | remain in the governing instrument? | | | 8 | X | |
| 7 | Did the formulation have at least \$5,000 to prosts at one time dening the coard | •• •••• | | 7 | X | |
| | If "Yes," complete Part II, col. (c), and Part XV. | ••••• | | | | |
| | Enter the states to which the foundation reports or with which it is registered (see instructions) | | | | ĺ | 1 |
| U | CO | | _ | | | |
| þ | 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 | | [| 85 | 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 calen | dar | 1 | | | |
| | 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 asting that names and addresses | <u></u> | <u></u> | 10 | | X |
| | | | - | 000 | 000 | **** |

| Part VM-A Startements Regarding Activities continued | | n 990-PF (2009) THE MARCUS FOUNDATION | 26-361 | 0094 | | Page 5 |
|--|----|--|---------------------------------------|--------|---------|----------|
| Section 12(D)(13)? If Yes, stach schedule (see reductions) 11 | _ | | | -, | | |
| 12 Det the bundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 13 Det the bundation comply with the pubble inspection requirements for its annual returns and exemption application? 13 X Whoste address ▶ N/A 14 The books are incorrol ► THE MARCUS POUNDATION Telephone no. ► (3.0.3) 9.08-14.30 Located at ▶ 2.50 JASMINE STREET, DENVER, CO ZIP44 ▶80.220 IP44 ■80.220 IP48 ■80 | 11 | | | | 1 | |
| August 17, 2008? 19 Did the Noundation comply with the public inspection requirements for its annual returns and exemption application? 11 The books are in care of IP THE MARCUS FOUNDATION 12 The books are in care of IP THE MARCUS FOUNDATION 13 The books are in care of IP THE MARCUS FOUNDATION 15 Section 4947(0X1) nonexempt charitable trusts filing form 990-FF in lieu of Form 1941 - Check hare 16 Located at #2 25 O JASMINE STREET, DENVER, CO 17 Located at #2 25 O JASMINE STREET, DENVER, CO 18 Section 4947(0X1) nonexempt charitable trusts filing form 990-FF in lieu of Form 1941 - Check hare 19 Located at #2 amount of 10x-board or accorded unity the years 19 Located at #2 amount of 10x-board or accorded unity the years 19 Located at #2 amount of 10x-board or accorded unity the years 19 Located at #2 amount of 10x-board or accorded unity the years 10 Loving the year did the foundation (either directly or inferectly); 11 Engage in the sale or exchange, or leasing of property with a disqualified person? 12 Borrow money from, lead money in, or otherwise exchand credit to for accept it from) a disqualified person? 13 Furthish goods, services, or facilities to (or accept them from) a disqualified person? 14 Pey compensation is, or pay or reinhouses the expenses of, a disqualified person? 15 Lay compensation is, or pay or reinhouses the expenses of, a disqualified person? 16 Person of the services, or facilities as for or accept them from) a disqualified person? 17 Les X No 18 Lay compensation is no pay or reinhouses the expenses of, a disqualified person? 18 Lay compensation is no pay or reinhouses the expenses of, a disqualified person? 19 Les X No 19 Lay compensation is no pay or greaternest of a disqualified person? 10 Les X No 10 Lay compensation is no pay or reinhouses the expenses of a disqualified person? 10 Lay compensation of tall (1) Lay compensation is a property to a government official? (Energies, Check No 10 Lay compensation is a price with a disqualified person? 10 Lay compe | ٠ | | | 11 | | X |
| 13 Did the Noundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are in care of \$\times \text{THE MARCUS FOUNDATION}\$ 15 Section 4947(0X) Inoncernge tharibate bruss Right perms 90-97 in level of from 1941-Check here and enter the amount of lox-accent pit interest received or accorned during the year. 15 Section 4947(0X) Inoncernge tharibate bruss Right perms 90-97 in level of from 1941-Check here and enter the amount of lox-accent pit interest received or accorned during the year. 16 Section 4947(0X) Inoncernge tharibate bruss Right perms 90-98 in level of from 1941-Check here and enter the amount of lox-accent pit interest received or accorned during the year. 17 Feet VII-8 Statements Regarding Activities for Whitch Form 4720 May Be Required. 18 Define the sandow carbon, or location to the "Yes" column, unlesses an acception applies. 19 Define the sandow carbon, or location to the refer of the form of the perms of the form of | 12 | • | | 1 | ł | |
| Webster actives | | | · · · · · · · · · · · · · · · · · · · | | | <u> </u> |
| Located at \$250 JASMINE STREET, DENVER, CO ZP-4 \$80220 Saction 497(%) in noncempt charitable trusts filing form 990-PF in lieu of Form 1041-Check here and enter the amount of the recompt interest received or accorded outring the year and enter the amount of the recompt interest received or accorded outring the year Tile Startorments Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any litem is checked on the "Year County, unlesses an exception appoiles. 15 | 13 | Website address ► N/A | | | | |
| Located at \$250 JASMINE STREET, DENVER, CO ZP-4 \$80220 Saction 497(%) in noncempt charitable trusts filing form 990-PF in lieu of Form 1041-Check here and enter the amount of the recompt interest received or accorded outring the year and enter the amount of the recompt interest received or accorded outring the year Tile Startorments Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any litem is checked on the "Year County, unlesses an exception appoiles. 15 | 14 | The books are in care of THE MARCUS FOUNDATION Telephone no. | (303) | 908 | -14 | 30 |
| and eries the amount of Exe-exempt interest received or accured during the year Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any items in cheeked on in the "Yes" Column, unlesses an exception applies. 1s During the year did the toundation (either directly or indirectly): 1j Engage in the sale or exchange, or leasing of property with a disqualified person? 1j Engage in the sale or exchange, or leasing of property with a disqualified person? 1j Engage in the sale or exchange, or leasing of property with a disqualified person? 1j Engage in the sale or exchange, or leasing of property with a disqualified person? 1j Engage in the sale or exchange, or accitities to (or accept them from) a disqualified person? 1j Engage in the sale or exchange, or facilities to (or accept them from) a disqualified person? 1j Engage in the sale or exchange, or facilities to (or accept them from) a disqualified person? 1j Engage in the sale or exchange, or facilities to (or accept them from) a disqualified person? 2j Engage in the sale or exchange, or facilities to (or accept them from) a disqualified person? 2j Engage in the sale or exchange in a disqualified person? 1j Yes 1km 1 | | Located at ▶ 250 JASMINE STREET, DENVER, CO | ZIP+4 -8 | 0220 | | |
| and enter the amount of tax-exempt interest received or accrued during the year Part VII-8 Startemments Regarding Activities for Whilch Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 15 During the year did the foundation (either directly or indirectly); 16 Engage in the sale or exchange, or lessing of property with a disqualified person? Yes X No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No (5) Transfer any income or assets to a disqualified person (or make any of either available nor the benefit or use of a disqualified person)? Yes X No (6) Agree to pay money or property to a government official? (Exception. Check "No" If the foundation any of the acts tail to qualify under the exceptions described in Regulations section 3.4 941(4)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A 1b Organizations relying on a current notice regarding disaster assistance heads have considered in the structure of the acts tail to qualify under the exceptions described in Regulations excepting on a current notice regarding disaster assistance, lead have considered in the structure of the acts tail to qualify under the exceptions described in Regulations relying on a current notice regarding disaster assistance, lead have considered in the structure of the structure of the acts tail to qualify under the exceptions described in Regulations relying on a current notice regarding disaster assistance of the exception and the structure of the structure of the structure of the structure of the structure of the structure of the structure of the structure of the structure of the structure of the structure of the structure of the s | 15 | Section 4244 (8)(1) unuspenitus custasties are se unud bottu ago et a unud 1041 - CUGCK UGUS | | | | |
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| before 2009? If "Yes," list the years Issted 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 undestributed income? (if applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. But the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A But If "Yes," the lapse of the foundation had excess business holdings in 2009.) If A But If "Yes," 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.) If A But If "Yes," the fact in the foundation had excess business holdings in 2009.) If A But If "Yes," the fact in the foundation had excess business holdings in 2009.) But If "Yes," the fact in the foundation had excess business holdings in 2009.) But If "Yes," the fact in the foundation had excess business holdings in 2009.) | | defined in section 4942(j)(3) or 4942(j)(5)): | | 11 | - 1 | |
| 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.) c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 8a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b if "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A 8b 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 | 2 | 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 | ľ | 1 1 | - 1 | |
| 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.) c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 8a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b if "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A 8b 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 | | before 2009? | ı 🛣 No | 1 1 | ı | |
| 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.) e If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 8a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A 8b Value 1 | | | | | - I | |
| statement - see instructions.) e If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 8a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 9 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.) 10 If A 3b If A b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | 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 | | | j | |
| e If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 8a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 9a 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.) 9a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 9a Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | | valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach | | { { | | |
| 8a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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.) 10 If A 3b 4a Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | | statement - See instructions.) | N/A | 2b | L | |
| during the year? If Yes, did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | C | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | ı | T | \neg | |
| during the year? 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.) 10 A B Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4 A Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | | > ,,,, | | | - 1 | |
| 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 tapse 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 tapse 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.) As Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4 | 80 | | |) } | 1 | |
| 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 tapse 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 tapse 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.) As Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4 | | during the year? | X No | | ı | |
| 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.) 10 | 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 | r | |] | |
| Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A 8b 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 | | May 26, 1969; (2) the tapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dis | pose | | - 1 | |
| 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 | | of holdings acquired by gift or bequest, or (8) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, | | | | |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | 1 | Form 4720, to determine if the foundation had excess business holdings in 2009.) | N/A | | | |
| | 4a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a | \Box | X |
| had not been removed from jeopardy before the first day of the tax year beginning in 2009? | | | | | T | |
| | | had not been removed from Jeopardy before the first day of the tax year beginning in 2009? | | 46 | | <u> </u> |

| Form 990-FF (2009) THE MARCUS FOUNDATION | | | 26-3610 | 094 | Page 6 |
|--|---------------------------------------|--|--|--------|---------------------|
| Part VII-B Statements Regarding Activities for Which | h Form 4720 May Be | Required (cont | inued) | | |
| 5a. During the year did the foundation pay or incur any amount to: | | | | - 1 | - { |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (sec | | | Yes 🛣 No 📗 | | ľ |
| (2) Influence the outcome of any specific public election (see section 4955) | | | | İ | 1 |
| any voter registration drive? | | ····□ | Yes X No | ı | |
| (3) Provide a grant to an individual for travel, study, or other similar purpos | | 'لــا ا | Yes 🛣 No | Ì |) |
| (4) Provide a grant to an organization other than a charitable, etc., organiza | tion described in section | | | ļ | - 1 |
| 509(a)(1), (2), or (3), or section 4940(d)(2)? | | ١لــا | Yes LX No |) |] |
| (5) Provide for any purpose other than religious, charitable, scientific, litera | | | [| | |
| the prevention of cruelty to children or animals? | | ١٠١ | res LXL No | | - 1 |
| b If any answer is 'Yes' to 5a(1)-(5), did any of the transactions tall to qualify i | | | | - (| - |
| section 53.4945 or in a current notice regarding disaster assistance (see ins | tructions)? | | N/A | 5b | |
| Organizations relying on a current notice regarding disaster assistance check | k here | | ▶└┴ ╽ | - (| 1 |
| e If the answer is "Yes" to question 5a(4), does the foundation claim exemption | | | 1 | ł | 1 |
| expenditure responsibility for the grant? | | й\₩Г Л | res L Ho | - } | |
| If "Yes," attach the statement required by Regulations section 53.49 | 1-7- | | 1 | - [| 1 |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, | | | | 1 | 1 |
| a personal benefit contract? | | ٧ لــا ٧ | es LXL No | 1 | 1 |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a | personal benefit contract? | | | 60 | X |
| If "Yes" to 6b, file Form 8870. | | | | | 1 |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax | shelter transaction? | ¥ | es LXL Mo | | |
| b If yes, did the foundation receive any proceeds or have any net income attrib | utable to the transaction? | <u></u> | N/A | 7b | |
| Part VIII Information About Officers, Directors, Trus | itees, Foundation Ma | anagers, Highl | У | | |
| 1 List all officers, directors, trustees, foundation managers and the | r compensation. | | | | |
| | (b) Title, and average | (c) Compensation | (C) Contributions to employee benefit plans and deterred | (o) E | xpense |
| (a) Name and address | hours per week devoted to ossition | (If not paid, enter -0-) | and deterred compensation | | nt, other vances |
| AMY HALPERIN WOOD | PRESIDENT | | | | |
| 250 JASMINE STREET | 1 | | | [| |
| DENVER, CO 80220 | 5.00 | 0. | 0. | | 0. |
| JONATHAN J. HALPERIN | VICE PRESIDEN | dr - | | | |
| 5609 BELMONT AVENUE | 7 |] | | | |
| CHEVY CHASE, MD 20815 | 5.00 | 0. | 0. | | 0. |
| | | | | | |
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| |] | l i | | | |
| | <u> </u> | | | | |
| 2 Compensation of five highest-paid employees (other than those in | (b) Title, and average | enter "NONE." | (d) Contributions to | (a) Ex | pense |
| (a) Name and address of each employee paid more than \$50,000 | hours per week devoted to position | (e) Compansation | (CI) Contributions to employee benefit plans and delarred | accoun | t, other |
| NONE | ooroco w posubii | | compensation | 42011 | |
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| Total number of other employees paid over \$50,000 | | | | | 0. |
| | | | Form 9 | 90-PF | (2009) |

| Form 990-FF (2009) THE MARCUS FOUNDATION | 26- | -3610094 | Page 7 |
|---|--------------------------------------|-------------|----------|
| Part VIII Information About Officers, Directors, Trustees, Foundate Paid Employees, and Contractors (continued) | | | |
| 3 Five highest-paid independent contractors for professional services. If none, enter | "NONE." | | |
| (a) Hame and address of each person paid more than \$50,000 | (b) Type of service | (c) Com | pensabor |
| NONE | 1 | | |
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| | 3 | | |
| Total number of others receiving over \$50,000 for professional services | | . ▶ | 0 |
| Part IX-A Summary of Direct Charitable Activities | | | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers produi | al information such as the cad, etc. | Expenses | ; |
| 1 N/A | | · | |
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| N. IV ST. | | <u></u> | |
| Part IX-B Summary of Program-Related Investments | | 4-5 | |
| Describe the two largest program-related investments made by the foundation during the tax year on line N/A | es 1 and 2. | Amount | |
| 1 <u>N/A</u> | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| All other program-related investments. See instructions. | | | |
| 1 | } | | |
| | | | |
| | | | |
| Total. Add lines 1 through 3 | | | 0. |
| | | Form 990-PF | (2009) |

| - | THE MARCUS FOUNDATION | 26-3610094 | Page t |
|----|--|------------------------------|--------|
| | art X Minimum Investment Return (Al domestic foundations must complete this part. Foreign fou | ndations, see instructions.) |) |
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| 1 | Average monthly fair market value of securities | 1a 1,366 | ,042 |
| ı | Average of monthly cash balances | 1b 43 | ,596 |
| • | Fair market value of all other assets | 16 | |
| • | Total (add lines 1a, b, and c) | 1d 1,409 | ,638 |
| • | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) | | |
| 2 | Acquisition indebteoness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 1,409 | ,638. |
| 4 | Cash deemed held for chantable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 21 | ,145 |
| 6 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 1,388 | ,493. |
| 8 | Minimum Investment return. Enter 5% of line 5 ADJUSTED FOR SHORT TAX PERIOD | 6 17 | ,499. |
| Ē | art XI Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations an foreign organizations check here and do not complete this part.) | d certain | |
| 7 | Minimum Investment return from Part X, line 6 | 17 | ,499. |
| 22 | | | |
| Ь | Income tax for 2009. (This does not include the tax from Part VL) | | |
| | Add lines 2a and 2b | 2c 2 | .103. |
| 8 | Distributable amount before adjustments. Subtract line 2c from line 1 | | 396. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | | ,396. |
| 6 | Deduction from distributable amount (see instructions) | 8 | 0. |
| 7 | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | | ,396. |
| Ē | art XII Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| | Expenses, contributions, guits, etc total from Part I, column (d), line 26 | 18 15, | 745. |
| b | Program-related investments - total from Part IX-B | 16 | 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: | | |
| 1 | Suitability test (prior IRS approval required) | 3a | |
| | Cash distribution test (attach the required schedule) | Sb | |
| 4 | Qualifying distributions. Add lines 1s through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 15, | 745. |
| 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. |
| 8 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 15, | 745. |
| • | Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation out | alifies for the section | |

Form **990-PF** (2009)

Part XIII Undistributed Income (see instructions)

| 1 Destributable amount for 2009 from Part XI, fine 7 | |
|--|-------------|
| 2 Undestributed income, if any, as of the end of 2009 a Enter amount for 2008 only b Total for prior years: 3 Excess distributions carryover, if any, to 2009: a From 2004 b From 2005 c From 2006 d From 2007 844. • From 2007 844. • From 2008 f Total of lines 3a through e 844. 4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ 1.5 , 7.4.5 a Applied to 2008, but not more than line 2a 0. • Applied to 2008, but not more than line 2a 0. • Applied to undistributed income of prior years (Election required - see instructions) 0. • Treated as distributions out of corpus (Election required - see instructions) 0. • Applied to 2009 distributable amount 0. • Remaining amount distributed out of corpus 34.9 . • Exter the set strial of each column as indicated ballow: | |
| 2 Undershaded income, if any, as of the end of 2009 a Either amount for 2008 only | |
| b Total for pror years: 2 Excess distributions carryover, if any, to 2009: 2 From 2004 2 b From 2005 2 From 2006 3 From 2007 4 From 2008 5 Total of times 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4: 1 \$ \$ 1.5 , 7.4.5 . 2 Applied to 2008, but not more than line 2a 3 Applied to undistributed income of prior years (Election required - see instructions) 5 Treated as distributions out of corpus (Election required - see instructions) 6 Applied to 2009 distributable amount 7 Remaining amount distributed out of corpus 8 Excess distributions corpose applied to 2009 9 Corpus distributions corpus distributions corpus distributions corpus distributions corpus distributions corpus distributions corpus distributions corpus distributions corpus distributions corpus distributions corpus distributio | 96. |
| 2 Excess distributions carryover, if any, to 2009: a From 2004 b From 2005 e From 2006 d From 2007 8 4 4 . a From 2008 f Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4: \$ \$ 1.5, 7.4.5. 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 from encours applied to 2009 from encours ap | 96. |
| a From 2004 b From 2005 e from 2006 d From 2006 d From 2008 f Total of times 3a through e A Qualifying distributions for 2009 from Part XII, line 4: > \$ 15,745. 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 a Remaining amount distributed out of corpus (Election required - see instructions) 0. 15,3 4 Applied to 2009 distributable amount a Remaining amount distributed out of corpus (Election required - see instructions) Excess distributions carryous applied to 2009 (If an emount applies in column (d), the same emounit must be above to column (d), the same emounit must be above to column (d). | 96. |
| a From 2004 b From 2005 e From 2006 d From 2007 844. e From 2008 f Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4: >\$ 1.5, 745. a Applied to 2008, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) e Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus e Remaining amount distributed out of corpus (I'ven enable applied to 2009 (I'v | 96. |
| b From 2005 e From 2006 d From 2007 844. e From 2008 f Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4: > \$ 15,745. a Applied to 2008, but not more than line 2e b Applied to undistributed income of prior years (Election required - see instructions) e Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus Excess distributions carryons applied to 2009 (if an emount appears in column (cf. the same emount must be shown in column (cf. the same emount must be shown in column (cf. the same emount must be shown in column (cf. the same emount indicated below: | 36. |
| e From 2006 d From 2007 e From 2008 f Total of lines 3s through e 4 Qualifying distributions for 2009 from Part XII, line 4: > \$ 15,745. 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 5 Excess distributions carryover applied to 2009 (if an enourie appears in column (cf. the same enourit must be shown to column (cf.) B Enter the set total of each column as indicated below: | 96. |
| dFrom 2007 eFrom 2008 f Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4: >\$ 15,745. 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 a Remaining amount distributed out of corpus 5 Excess distributions carryower applied to 2009 (if an emount applies in column (c), the same amount must be shown in column (c). B Ester the set spial of each columns as indicated below: | 96. |
| # From 2008 # Total of lines 3s through # | 96. |
| f Total of lines 3s through e 844. 4 Qualifying distributions for 2009 from Part XII, line 4: >\$ 15,745. a Applied to 2008, but not more than line 2s 0. 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 15,3 e Remaining amount distributed out of corpus 349. Excess distributions carryover applied to 2009 (if an amount appears in column (d) the same amount must be shown to column (d). Ester the set total of each column as indicated below: | 96. |
| 4 Qualifying distributions for 2009 from Part XII, line 4: > \$ 15,745. 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 5 Excess distributions carryover applied to 2009 (if an amount appears in column (d.) the same amount must be shown in column (d.) 8 Exter the set total of each columns as indicated below: | 96. |
| Part XII, line 4: >\$ 15,745. 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 15, 3 e Remaining amount distributed out of corpus 349. Excess distributions carryower applied to 2009 (if an amount applied in column (d) the same amount must be shown in column (d). The same amount applied to 2009 (if an amount applied in column (d) the same amount applied between (a) 15 in amount applied to 2009 (if an amount applied in column (d) the same amount applied between (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied (a) 15 in amount applied | 96. |
| a 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 Excess distributions carryover applied to 2009 (if an emount applied in column (d), the same amount must be shown in column (d). | 96. |
| 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 Excess distributions carryover applied to 2009 (if an amount appears in column (d), the same amount must be shown in column (d). Ester the set total of each column as indicated below: | 96. |
| years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount c Remaining amount distributed out of corpus Excess distributions carryover applied to 2009 (if an amount appears in column (d), the same amount must be shown in column (d). Ester the set total of each column as indicated below: | 96. |
| c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus Excess distributions carryover applied to 2009 (if an amount applies in column (d), the same amount must be shown in column (d). Ester the set total of each column as indicated below: | 96. |
| (Election required - see instructions) 0. d Applied to 2009 distributable amount 15, 3 e Remaining amount distributed out of corpus 34.9. Excess distributions carryover applied to 2009 (if an amount appliers in column (d), the serie amount must be shown in column (d). Ester the set total of each column as indicated below: | 96. |
| d Applied to 2009 distributable amount e Remaining amount distributed out of corpus Excess distributions carryover applied to 2009 (if an emount applies in column (di. the same emount must be aboven in column (di.) Ester the set total of each column as indicated below: | 96. |
| e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2009 (if an amount applies in column (d), the serie emount must be shown in column (a), 6 Ester the set total of each columns as indicated below: | <u> </u> |
| 5 Excess distributions carryover applied to 2009 (if an emount appears in column (cit. the same emount must be above in column (cit.) 5 Exter the set total of each column as indicated below: | |
| (If an amount appears in column (ct) the same emount must be shown in column (ct) B. Enter the set total of each column as indicated below: | 0. |
| indicated below: | |
| 8 Corpus, Add lines 31, 4c, and 4c, Subtract line 5 1, 193. | |
| | |
| Prior years' undistributed income. Subtract | |
| tine 4b from line 2b | |
| e 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 true 6c from line 6b. Taxable | |
| amount - see instructions | |
| e Undistributed income for 2008. Subtract line | |
| 4a from Ene 2a. Taxable amount - see instr. | |
| f Lindistributed Income for 2009. Subtract | |
| lines 4d and 5 from line 1. This amount must | |
| be distributed in 2010 | 0. |
| Amounts treated as distributions out of | |
| corpus to satisfy requirements imposed by | |
| section 170(b)(1)(F) or 4942(g)(3) 0 | |
| Excess distributions carryover from 2004 | |
| not applied on line 5 or line 7 | |
| Excess distributions carryover to 2010. | _ |
| Subtract lines 7 and 8 from line 6a 1,193. | |
| Analysis of line 9: | |
| a Excess from 2005 | |
| D Excess from 2006 | |
| e Excess from 2007 844. | |
| dExcess from 2008 | |
| e Excess from 2009 349 . | |

| Part XIV Private Operating For | undations (see in | | NA question 9) | N/A | 10094 Page |
|--|-------------------------|---------------------------|--------------------------|---|-------------------|
| 1 a if the foundation has received a ruling or di | | | | - W/ R | ···· |
| foundation, and the ruling is effective for 20 | | | | | |
| b Check box to indicate whether the foundati | • | | in section | 4942(j)(3) or 4 | 942(j)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year | | Prior 3 years | | 1 |
| income from Part I or the minimum | (a) 2009 | (5) 2008 | (e) 2007 | (d) 2006 | (e) Total |
| investment return from Part X for | | | ,,,,,,,, | .,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | |
| each year listed | | | | | |
| b 85% of line 2a | | <u> </u> | | | |
| e Qualifying distributions from Part XII, | | 1 | | | i |
| line 4 for each year listed | | | | | |
| d Amounts included in line 2c not | | } | 1 | 1 | 1 |
| used directly for active conduct of | | | | | |
| exempt activities | | <u> </u> | | | ļ |
| Qualitying distributions made directly | | | 1 | ļ | |
| for active conduct of exempt activities. | | | 1 | 1 | |
| Subtract line 2d from line 2c | | | | | |
| alternative test relied upon; | | 1 | | | |
| a "Assets" alternative test - enter: | | 1 | 1 | 1 | |
| (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 | | | | | |
| e "Support" atternative test - enter: | | | | | |
| (1) Total support other than gross | | | | | |
| investment income (interest, | | | l | İ | |
| dividends, rents, payments on securities loans (section | | | 1 | 1 | |
| 512(a)(5)), or royalties) | | | 1 | | |
| (2) Support from general public | | | | | |
| and 5 or more exempt organizations as provided in | | | | | |
| section 4942([)(3)(B)(iii) | _ | | | i | |
| (8) Largest amount of support from | | | | | |
| an exempt organization | | | <u> </u> | | |
| (4) Gross investment income | | | | | |
| Part XV Supplementary Information | | | If the foundation | n had \$5,000 or mo | re in assets |
| at any time during the | | nstructions.) | | · · · · · · · · · · · · · · · · · · · | |
| Information Regarding Foundation M | • | han 607 addin hadal a a d | A. A | . d d. et b d b b | |
| List any managers of the foundation who have year (but only if they have contributed more) | | | noutions received by the | roundation defore the close | e or any tax |
| ONE | | | | | |
| b List any managers of the foundation who ow | n 1094 or more of the | stock of a composition (| or an equally brong post | on of the ownership of a na | tocrebin or |
| other entity) of which the foundation has a 19 | | | or art adomin im no hour | on or the ownership of a pa | umanup oi |
| ONE | | | | | |
| Information Regarding Contribution, | Grant, Gift, Loan, | Scholarship, etc., Pri | ograma: | | ····· |
| Check here | | | | not accept unsolicited reque | sts for funds, If |
| the foundation makes gifts, grants, etc. (see | | | | | |
| a The name, address, and telephone number of | I the person to whom | applications should be a | eddressed: | | |
| • | - | | | | |
| | | | | | |
| b The form in which applications should be sub | omitted and information | on and materials they sh | ould include: | | |
| e Any submission deadlines: | | | | | |
| d Any restrictions or limitations on awards, suc | h as by geographical | areas, charitable fields. | unds of institutions, or | other factors: | |
| • | | -, | | ·= - - - | |
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Form 990-PF (2009)

| Recipient | te Year or Approved for Future If recipient is an individual, show any retationship to any loundation manager or substantial contributor | Foundation | Purpose of grant or contribution | A |
|-------------------------------------|---|------------------------|----------------------------------|----------|
| Name and address (home or business) | any foundation manager or substantial contributor | status of recipient | contribution | Amount |
| Paid during the year | | | | |
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| Approved for future payment | | <u> </u> | | +5,2. |
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| er gross amounts unless otherwise indicated. | | (II) | (C) Exchi- | by section 512, 513, or 514 (d) | (e) Related or exempt |
|--|-------------------------|---------------------------------------|--|------------------------------------|--------------------------|
| Program service revenue; | (a) Business code | Amount | sion | Amount | function income |
| · | | | | | |
| b | | | | | · |
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| a Cose and neglects for an angenesis | | | ↓ | | |
| Fees and contracts from government agencies Membership dues and assessments | | | | | |
| Membership dues and assessments Interest on savings and temporary cash | | | | | |
| | 1 | | 1 1 | ſ | |
| rivestments | | | 14 | 3,063. | |
| Net rental income or (loss) from real estate: | | | - | 3,003. | |
| Debt-financed property | | | | | |
| h Mrd dobt Sananad areasets | | | - | | |
| let rental income or (loss) from personal | | | | | |
| | 1 | | 1 1 | | |
| property | | | ╁╌┼╴ | | |
| Bain or (loss) from sales of assets other | | | | | |
| than inventory | 1 | | 18 | 102,167. | |
| let income or (loss) from special events | | | 1-9- | 102,107. | |
| Pross profit or (loss) from sales of inventory | | | | | |
| ther revenue: | | | | | · |
| inici roveribe. | 1 | | 1 1 | 1 | |
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| | | | | 105,230. | |
| uhirtrid Add cohumns (h) (d) and (o) | | - 11 | | 103,430. | |
| ubtotal. Add columns (b), (d), and (e) | | 0. | - | 40 | 105 220 |
| otal. Add line 12, columns (b), (d), and (e) | | | | | 105,230 |
| otal. Add line 12, columns (b), (d), and (e) | the Accomp | Mishment of Exumn (e) of Part XVI-A | empt P | ırposes | |
| otal. Add line 12, columns (b), (d), and (e) | the Accomp | Mishment of Exumn (e) of Part XVI-A | empt P | ırposes | |
| otal. Add line 12, columns (b), (d), and (e) | the Accomp | Mishment of Exumn (e) of Part XVI-A | empt P | ırposes | |
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| otal. Add line 12, columns (b), (d), and (e) | the Accomp | Mishment of Exumn (e) of Part XVI-A | empt P | ırposes | |
| otal. Add line 12, columns (b), (d), and (e) | the Accomp | Mishment of Exumn (e) of Part XVI-A | empt P | ırposes | |

| | | | FOUNDATI | | | 26-3610 | 094 | Pa | age 12 |
|--|--|-------------------------|---|--|--|--------------------------------|------------|----------------|------------|
| Part | XVII Information Exempt Orga | Regarding enizations | Transfers To | and Transaction: | s and Relationship | s With Nonchar | itabk | • | |
| -1 Did | the organization directly or in | | in any of the follow | ring with any other organiz | ation described in section 5 | 01(c) of | 1 | Yes | No |
| the | Code (other than section 501 | (c)(3) organiza | tions) or in section | 527, relating to political or | ganizations? | • • | | | |
| a Tra | nsters from the reporting tour | ndation to a not | nchantable exempt | organization at: | | | l I | | |
| (1) | Cash | | | · · · · · · · · · · · · · · · · · · · | | | 1a(1) | | X |
| (2) | | | | | | | 14(2) | | X |
| | er transactions: | | | | | | | | |
| | Sales of assets to a nonchar | | | | *** ** *** *** * * * | | 16(1) | | X |
| | Purchases of assets from a r | | | | · · · · · · · · · · · · · · · · · · · | | 16(2) | | X |
| | Rental of facilities, equipmen | | | | | | 16(3) | | _ <u>x</u> |
| | Reimbursement arrangemen | | | | | | 1b(4) | | <u> X</u> |
| | Loans or loan guarantees | | | | | · · · · · · · · · · · · | 16(5) | | X |
| e Sha | Performance of services or n ring of facilities, equipment, n | nation lists of | or eccept of points | NIS | · · · · · · · · · · · · · · · · · · · | | 16(6) | | X |
| d Hth | e answer to any of the above | r Yes ' comb | er assers, or part er to the following cel | nukuyusa | nhaman about the fall moule | | 10 | | <u> </u> |
| OFE | ervices given by the reporting | in indetion it | the foundation mee | reduce. Committee (b) should used loss than fair market o | anways show the late marks | t value of the goods, of | nverassi | ers, | |
| | imn (d) the value of the goods | | | | and in any wanted-out of Si | mild an and cutouf 21s | UW HI | | |
| (a)Line no | | | | le sæmpt organization | (d) Description of tra | nations, transactions, and ah | ering arti | | 101 |
| | | | N/A | | | | | - | |
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| | e foundation directly or indirec | | | | | | l | - | |
| | ction 501(c) of the Code (others," complete the following scr | | SUT(C)(3)) OF IN SEC | | | | Yes | X | No |
| D 11 10 | (a) Name of or | | | (b) Type of organization | (c) De | scription of relationship | | | |
| | N/A | | | 1 (0) (),,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | 1 (0)35 | | | | |
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| | ensities of perjury, I declare that I I | | | | | owledge and bellef, it is true | , correct, | | _ |
| and cor | nplata. Declaration of preparer (oth | er then texpelyer o | r figluciary) is besed on | all interpretion of which prepain | or has any knowledge. | | | | |
| MIS | Arry H. Wood | | | 01/2/13 | TREE. | | | | |
| S | gnature of officer or trustee | | | Date | Title | | | | |
| | Preparer's SSS | . 0 | | 1 | Date Check if self- | Preparer's | dentifyin | g numb | , |
| 3 6 | Signature P 1 | mes L. B | mrgick | | I) (12 Self- employed | | | | |
| Preparer Use Only | 1 | ICK & A | ASSOCIATE | - | EIN | > | | | |
| ₽ \$5 | | | | PARKWAY, SUI | TE 110 | | | | |
| ــــــــــــــــــــــــــــــــــــــ | address, and ZIP code GREE | MOOD 1 | /ILLAGE, | CO 80111 | Phor | ne na. 303-81 | | | |
| | | | | | | Form : | 990-F | 7 F (20 | (90) |

CIS Image-Do Not Correspond for Signature

Schedule B (Form 900, 900-EZ, or 900-PF)

Schedule of Contributors

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

OMB No. 1545-0047

Primark of the Treasury ref Revenue Service The of the organization Employer identification number THE MARCUS POUNDATION 26-3610094 Organization type (check one): Filers of: Section: 501(c)(Form 990 or 990-F7) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization 501(c)(3) exempt private foundation Form 990-PF 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 fiting 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).

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

| | (Farm 980, 800-EZ, ar 980-PF) (2009) Irga sitzation | | Prop 1 of 1 of Prof Employer identification number |
|------------|--|-------------------------------|---|
| THR N | ARCUS FOUNDATION | 1 | 26-3610094 |
| Part ! | Contributors (see instructions) | | 20 3020032 |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributi | (d) Type of contribution |
| 1 | GRACE R. AND ALAN D. MARCUS FOUNDATION 7 WEST 81ST STREET NEW YORK, NY 10024 | s <u>1,151,83</u> | Person Payroll Noncash X (Complete Part II if there is a noncash contribution |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contribution | (d) ons Type of contribution |
| 2 | GRACE R. AND ALAN D. MARCUS FOUNDATION 7 WEST 81ST STREET NEW YORK, NY 10024 | s21,27 | Person X Payroll Noncash (Complete Part II if there is a noncash contribution |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributio | (d) Ins Type of contribution |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution |
| (a) No. | (b) Name, address, and 25P + 4 | (c) Aggregate contributio | (d) Type of contribution |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution. |
| (a) No. | (b) Name, address, and ZEP + 4 | (c) Aggregate contribution | (d) ns Type of contribution |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution. |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contribution | (d) Type of contribution |
| | | • | Person Payroll Moncock |

923452 02-01-10

(Complete Part II if there is a noncash contribution.)

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

Prop 1 or 1 of Part a

THE MARCUS FOUNDATION

26-3610094

| ert II | Noncash Property (see instructions) | | |
|------------------------------|--|--|----------------------|
| (e) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| 1 | REPRESENTS COST BASIS OF SECURITIES CONTRIBUTED ON 10-1-09 UPON DIVISION OF THE NAMED FOUNDATION | s1,151,838. | 10/01/09 |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncesh property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | s | |
| (a) No. Irom Part I | (b) Description of noncesh property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| - | | s | |
| (a) No. rom bart i | (b) Description of noncesh property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | s | |
| (a) No. rom ert I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | s | |

| 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 sis. MLC Co. 19 REPUBLIC SERVICES INC (1888 SHARES) b DRESS BARN INC (3350 SHARES) c CROWN HOLDINGS INC (475 SHARES) d WR BERKLEY CORP (400 SHARES) | | (5) How acquire P - Purchase D - Donation | (e) Date acquir (mo., day, yr. | ed (d) Date sold | | | | |
|---|---------------|---|---|-------------------|--|--|--|--|
| 2-story brick warehouse; or common stock, 200 sis. MLC Co. 19 REPUBLIC SERVICES INC (1888 SHARES) b DRESS BARN INC (3350 SHARES) c CROWN HOLDINGS INC (475 SHARES) | | | (e) Date acquir | ed (d) Date sold | | | | |
| b REPUBLIC SERVICES INC (1888 SHARES) b DRESS BARN INC (3350 SHARES) c CROWN HOLDINGS INC (475 SHARES) | | | |) | | | | |
| b DRESS BARN INC (3350 SHARES) c CROWN HOLDINGS INC (475 SHARES) | | | | 10/01/09 | | | | |
| c CROWN HOLDINGS INC (475 SHARES) | | D D | | 9VARIOUS | | | | |
| | | | | | | | | |
| OWK DEMALEI CURP (400 DEMARES) | D | | 910/08/09 910/12/09 | | | | | |
| e EQT CORP (225 SHARES) | | | 910/12/09 | | | | | |
| 1 EQT_CORP (150 SHARES) D 10/10/081 | | | | | | | | |
| g TERADATA CORP (800 SHARES) D 03/20/09WAR1 | | | | | | | | |
| h SOUTHWESTERN ENERGY CO (300 SHARES) | D | | 10/13/09 | | | | | |
| VISA INC (763 SHARES) | D | | 910/16/09 | | | | | |
| APPLE INC (105 SHARES) | | D | | 8VARIOUS | | | | |
| k POTASH CORP OF SASKATCHEWAN INC (575 SH | ARES) | D | | VARIOUS | | | | |
| GENTEX CORP (1000 SHARES) | | D | | 910/21/09 | | | | |
| m URBAN OUTFITTERS INC (275 SHARES) n CELGENE CORP (225 SHARES) | | D | | 910/23/09 | | | | |
| o APPLE INC (30 SHARES) | | D | | 10/23/09 | | | | |
| /6 Commission of France / (a) Contract | har hoose | | | 9 <u>12/07/09</u> | | | | |
| (a) Gross sales price (f) Depreciation allowed (g) Cost or ot (or allowable) plus expense | | | ı) Gaun or (loss) plus (f) minus (g) | | | | | |
| | 37,865. | | | 11,119. | | | | |
| b 68,843. | 53,716. | | | 15,127. | | | | |
| | 10,304. | | | 3,089. | | | | |
| d 10,300. | 9,126. | | | 1,174. | | | | |
| 9,992. 1 6,662. | 7,711. | | | 2,281. | | | | |
| 77 777 | 3,328. | | | 3,334. 9,817. | | | | |
| n 13,325. | 11,105. | | | 2,220. | | | | |
| | 44,912 | | | 11,852. | | | | |
| | 10,419. | | | 10,380. | | | | |
| | 48,265. | | | 15,597. | | | | |
| | 14,266. | | | 2,868. | | | | |
| m 9,264. | 6,154. | | | 3,110. | | | | |
| | 11,053. | | | 1,287. | | | | |
| 5,715. | 5,820. | | | -105. | | | | |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/ | | Gains (excess | ises (from col. (h) of col. (h) gain ovi | er col. (k), | | | | |
| (I) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), | if any | DUT R | ot less than "-0-") | | | | | |
| | | | | 11,119. | | | | |
| | | | | 15,127. 3,089. | | | | |
| | } | | | 1.174. | | | | |
| <u> </u> | | | | 2,281. | | | | |
| | ··· | | | 3,334. | | | | |
| | | | | 9,817. | | | | |
| | | | | 2,220. | | | | |
| | | | | 11,852. | | | | |
| | | | | 10,380. | | | | |
| | | | | 15,597. | | | | |
| | | | | 2,868. | | | | |
| <u> </u> | | | | 3,110. | | | | |
| <u> </u> | | | | 1,287. -105. | | | | |
| | | | | | | | | |
| Capital gain net income or (net capital loss) (If gain, also enter in Part I, line 7) | | 2 | | | | | | |
| Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): if gain, also enter in Part I, line 8, column (c). if (loss), enter "-0-" in Part I, line 8 | } [| 3 | | - ·- - | | | | |

N/A

THE MARCUS FOUNDATION 26-3610094 PAGE 2 OF Part IV Capital Gains and Lesses for Tax on lovestment Income (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (f) Date sold (mo., day, yr.) P - Purchase D - Donation 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) to ROMA FINANCIAL GROUP (2950 SHARES) 10/23/0812/21/09 D b ROMA FINANCIAL GROUP (1350 SHARES) c VERTEX PHARMACEUTICALS INC (1575 SHARES) d SOUTHWESTERN ENERGY CO (475 SHARES) VARIOUS 12/21/09 D VARIOUS 11/19/09 VARIOUS 12/28/09 10/29/0912/02/09 D e POTASH CORP OF SASKATCHEWAN INC (75 SHARES) 1 CAPITAL GAINS DIVIDENDS k m n 0 (g) Cost or other basis (f) Depreciation allowed (h) Gain or (loss) (e) Gross sales price (or allowable) olus expense of sale (e) plus (f) minus (g) 35,547. 41,138. 17,347. -5,591. 16,268. -1,079. þ 61,116. 51,559. <u>557.</u> C 23,733. 20,437. đ ,296. 9,055. 1,878. 7,177. 956. ŧ 956. h m n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (1) Losses (from col (h)) (i) Adjusted basis Gains (e cess of col. (h) gain over col. (k), (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 as of 12/31/69 but not less than "-0-") over col. (j), if any -5,591. -1,079. b 9,557. 3,296. 1,878. 956. h m n 0 2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 } 102,167. 2

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

| FORM 990-PF DIVIDENT | OS ANI | O INTE | rest | FROM | SECU | RITIES | STATEMEN | r |
|--|--------|----------------------|----------------|----------------------|---------------|------------------------------|--------------|------------|
| SOURCE | | GROS | S AMO | TNUC | | ITAL GAINS | COLUMN AMOUN | |
| FIDUCIARY TRUST COMPANY INTL | 4,019. | | | 956. | 3 , | 063 | | |
| TOTAL TO FM 990-PF, PART I, I | | | 4, | 019. | | 956. | 3, | 063 |
| FORM 990-PF | ···· | TAX | ŒS | | · · · · · · · | | STATEMENT | r : |
| DESCRIPTION | EXPE | A) INSES BOOKS | | | ST- | (C) ADJUSTE NET INCO | | ABLE |
| FOREIGN TAX PAID | | 39. | | | 39. | | | 0. |
| TO FORM 990-PF, PG 1, LN 18 = | | 39. | | | 39. | | | 0. |
| FORM 990-PF | 0 | THER E | XPEN | SES | | | STATEMENT | 3 |
| DESCRIPTION | EXPR | a) NSBS Books | | (B) INVE I INC | | (C) ADJUSTEI NET INCOM | | ABLE |
| ASSOCIATION FOR SMALL POUNDATIONS MISCELLANEOUS FERS | | 495. 36. | | | 0. 36. | | | 495. 0. |
| TO FORM 990-PF, PG 1, LN 23 | | 531. | | | 36. | | | 495. |
| ORM 990-PF | отн | er inv | ESTMI | ents | | | Statement | 4 |
| DESCRIPTION | _ | | LUAT] BTHOI | | воо | K VALUE | FAIR MARK | BT |
| PIDUCIARY TRUST INTERNATIONAL (EQUITIES) | | - | COST | | 1 | ,226,643. | 1,415, | 778. |
| COTAL TO FORM 990-PF, PART II, | , LIN | 3 13 | | - | 1 | ,226,643. | 1,415, | 778. |

| FORM 990-PF GRANTS PAID | AND CONTRIBUTIONS DURING THE YEAR | STATEMENT 5 | | |
|--|---|-------------|--------|--|
| RECIPIENT NAME AND ADDRESS | RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT | | AMOUNT | |
| WORCESTER ACADEMY 51 PROVIDENCE STREET WORCESTER, MA 01604 | UNRELATED TO SUPPORT THE LIBRARY AT WORCESTER ACADEMY | PUBLIC | 1,200. | |
| DUMB FRIENDS LEAGUE 2800 S. QUEBEC STREET DENVER, CO 80231 | UNRELATED TO SUPPORT THE DUMB FRIENDS LEAGUE | PUBLIC | 1,550. | |
| COLORADO ACADEMY 3800 PIERCE STREET DENVER, CO 80235-2404 | | PUBLIC | 1,000. | |
| MAZON 1990 SOUTH BUNDY DRIVE #260 LOS ANGELES, CA 90025 | | PUBLIC | 1,000. | |
| GEORGE WASHINGTON HIGH SCHOOL P.O. BOX 460595 DENVER, CO 80246 | UNRELATED TO SUPPORT THE SPEECH & DEBATE CLUB AT GW HIGH SCHOOL | PUBLIC | 1,000. | |
| WILD BIRD P.O. BOX 37 ARVADA, CO 80001 | UNRELATED TO SUPPORT WILD B.I.R.D. INFORMATION & REHAB OF DENVER | PUBLIC | 1,000. | |
| VOLUNTEERS OF AMERICA 2660 LARIMER STREET DENVER, CO 80205 | | PUBLIC | 1,000. | |
| SPARE KEY 1550 AMERICAN BLVD, SUITE L-2 BOOMINGTON, MN 55425 | UNRELATED TO SUPPORT GOOD WORK AT SPAREKEY | PUBLIC | 250. | |

| THE MARCUS FOUNDATION | | | 26-3610094 |
|---|--|--------|------------|
| THE WILDERNESS SOCIETY 1615 M STREET, NW WASHINGTON, DC 20036 | UNRELATED TO SUPPORT GOOD WORK AT WILDERNESS SOCIETY | PUBLIC | 1,000. |
| GREENHOME P.O. BOX 42676 WASHINGTON, DC 20015 | UNRELATED TO SUPPORT GOOD WORK AT GREENHOME | PUBLIC | 2,250. |
| CERES 99 CHAUNCY STREET, 6TH FLOOR BOSTON, MA 02111 | UNRELATED TO SUPPORT CERES | PUBLIC | 1,000. |
| SOMERSET EDUCATIONAL FOUNDATION P.O. BOX 30764 BETHESDA, MD 20824 | UNRELATED TO SUPPORT THE SOMERSET EDUCATIONAL FOUNDATION | PUBLIC | 1,000. |
| GRIST 710 SECOND AVENUE SEATTLE, WA 98105 | UNRELATED TO SUPPORT GRIST | PUBLIC | 2,000. |
| TOTAL TO FORM 990-PF, PART XV, L | INE 3A | | 15,250. |