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Return of Private Foundation

OMB No 1545-0052

2010

Department of the Treasury
Internal Revenue Serviceor 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.

For calendar year 2010, or tax year beginning APR 1, 2010, and ending MAR 31, 2011

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

Name of foundation WILLIAM AND CYNTHIA MARCUS FAMILY CHARITABLE TRUST		A Employer identification number 04-6042910
Number and street (or P.O. box number if mail is not delivered to street address) 99-50 FLORENCE STREET	Room/suite	B Telephone number 781-237-6655
City or town, state, and ZIP code CHESTNUT HILL, MA 02467-1935		C If exemption application is pending, check here ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,115,793. (Part I, column (d) must be on cash basis)	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		635.	635.		STATEMENT 2
4 Dividends and interest from securities		13,264.	13,264.		STATEMENT 3
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-212,636.			STATEMENT 1
b Gross sales price for all assets on line 6a 592,395.					
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		686.	0.		STATEMENT 4
12 Total. Add lines 1 through 11		-198,051.	13,899.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 5		10,500.	7,000.		3,500.
c Other professional fees					
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		1,178.	0.		1,178.
22 Printing and publications					
23 Other expenses STMT 6		155.	120.		35.
24 Total operating and administrative expenses. Add lines 13 through 23		11,833.	7,120.		4,713.
25 Contributions, gifts, grants paid		250,542.			250,542.
26 Total expenses and disbursements. Add lines 24 and 25		262,375.	7,120.		255,255.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-460,426.			
b Net investment income (if negative, enter -0-)			6,779.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	154,367.	454,107.	454,107.
	3 Accounts receivable ▶ 4,390.			
	Less: allowance for doubtful accounts ▶	4,309.	4,390.	4,390.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	734,663.	0.	0.
	c Investments - corporate bonds STMT 8	43,000.	38,000.	38,000.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	666,147.	645,563.	619,296.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	1,602,486.	1,142,060.	1,115,793.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
Net Assets or Fund Balances	23 Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Net Assets or Fund Balances	29 Retained earnings, accumulated income, endowment, or other funds	1,602,486.	1,142,060.	
	30 Total net assets or fund balances	1,602,486.	1,142,060.	
	31 Total liabilities and net assets/fund balances	1,602,486.	1,142,060.	

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	1,602,486.
2 Enter amount from Part I, line 27a	2	-460,426.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,142,060.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,142,060.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENT				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 592,395.		631,645.	-39,250.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			-39,250.

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 }

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter -0- in Part I, line 8

2 -39,250.

3 N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	246,571.	1,461,288.	.168735
2008	408,375.	1,956,687.	.208707
2007	369,721.	2,647,770.	.139635
2006	395,910.	3,024,122.	.130917
2005	555,507.	2,206,876.	.251716

2 Total of line 1, column (d) 2 .899710

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 .179942

4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5 4 1,165,715.

5 Multiply line 4 by line 3 5 209,761.

6 Enter 1% of net investment income (1% of Part I, line 27b) 6 68.

7 Add lines 5 and 6 7 209,829.

8 Enter qualifying distributions from Part XII, line 4 8 255,255.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	68.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	68.
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	68.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	1,548.	
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	1,548.	
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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,480.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax ☒ 1,480. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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FAMILY CHARITABLE TRUST**

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>THE FOUNDATION</u> Located at ► <u>99-50 FLORENCE STREET, CHESTNUT HILL, MA</u> Telephone no. ► <u>781-237-6655</u> ZIP+4 ► <u>02467-1935</u>			
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 <u>N/A</u>			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	X
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 2010?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☒ No If "Yes," list the years ► _____, _____, _____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
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 2010 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 2010.) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870.

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		0.	0.	0.

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

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

Total number of other employees paid over \$50,000

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 NONE	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 NONE	
	0.
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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**WILLIAM AND CYNTHIA MARCUS
FAMILY CHARITABLE TRUST**
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	922,607.
b	Average of monthly cash balances	1b	260,860.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,183,467.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,183,467.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	17,752.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,165,715.
6	Minimum investment return. Enter 5% of line 5	6	58,286.

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	58,286.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	68.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	68.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	58,218.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	58,218.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	58,218.

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	255,255.
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	255,255.
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	68.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	255,187.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				58,218.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005	494,035.			
b From 2006	250,808.			
c From 2007	243,967.			
d From 2008	317,603.			
e From 2009	172,973.			
f Total of lines 3a through e	1,479,386.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ \$	255,255.			
a Applied to 2009, 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 2010 distributable amount				58,218.
e Remaining amount distributed out of corpus	197,037.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	1,676,423.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	494,035.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	1,182,388.			
10 Analysis of line 9:				
a Excess from 2006	250,808.			
b Excess from 2007	243,967.			
c Excess from 2008	317,603.			
d Excess from 2009	172,973.			
e Excess from 2010	197,037.			

**WILLIAM AND CYNTHIA MARCUS
FAMILY CHARITABLE TRUST**

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEE STATEMENT 11				
Total			► 3a	250,542.
b <i>Approved for future payment</i>				
NONE				
Total			► 3b	0.

Part XVII

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

- | 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? | Yes | No |
|----------|--|-------|----|
| | | | |
| 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. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

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

**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.

622-111111

$$2 \mid 13 \mid 12$$

TRUSTEE

Signature of officer or trustee

Date _____

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if
self-employed

PTIN	
------	--

STEVEN B. SCHWARTZ,
CPA

STEVEN B. SCHWART	02/02/12
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02/02/12

Firm's name ▶ **FRIEDMAN, SUVALLE & SALOMON, PC CPA**

Firm's EIN ▶

Firm's address ► 70 WELLS AVENUE
NEWTON, MA 02459

Phone no. 617-641-0040

Form **990-PF** (2010)

**WILLIAM AND CYNTHIA MARCUS
FAMILY CHARITABLE TRUST**

CONTINUATION FOR 990-PF, PART IV
04-6042910 PAGE 1 OF 1

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	23 SHS, CALL SUNOCO	P	01/15/10	05/17/10
b	39 SHS, CALL CMCSK	P	08/23/10	11/30/10
c	3,000 SHS, BJ SERVICES CO	P	06/11/07	04/30/10
d	BAKER HUGHES INC - CASH IN LIEU	P	06/11/07	04/28/10
e	2,300 SHS, SUNOCO	P	06/24/09	05/14/09
f	1,201 SHS, BAKER HUGHES INC	P	06/11/07	06/08/10
g	2,000 SHS, PRECISION DRILLING	P	10/11/06	06/08/10
h	3,000 SHS, GENERAL ELECTRIC	P	07/12/07	06/08/10
i	2,500 SHS, AT&T	P	08/26/09	11/30/10
j	2,500 SHS, CLEARBRIDGE ENERGY MLP	P	06/24/10	11/30/10
k	3,950 SHS, COMCAST CORP	P	11/03/88	11/30/10
l	500 SHS, HOME DEPOT	P	07/01/94	11/30/10
m	2,000 SHS, ELI LILLY & CO	P	08/26/09	11/30/10
n	2,000 SHS, MEDTRONIC INC	P	09/17/93	11/30/10
o	4,000 SHS, PFIZER INC	P	07/12/07	11/30/10

(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 6,072.		7,539.	-1,467.
b 3,209.		6,758.	-3,549.
c 8,070.		8,070.	0.
d 2.		3.	-1.
e 63,998.		54,008.	9,990.
f 43,706.		78,362.	-34,656.
g 13,377.		54,523.	-41,146.
h 44,969.		115,760.	-70,791.
i 68,805.		67,356.	1,449.
j 52,452.		48,532.	3,920.
k 74,068.		8,317.	65,751.
l 15,052.		2,730.	12,322.
m 66,963.		68,062.	-1,099.
n 66,906.		7,720.	59,186.
o 64,746.		103,905.	-39,159.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-1,467.
b			-3,549.
c			0.
d			-1.
e			9,990.
f			-34,656.
g			-41,146.
h			-70,791.
i			1,449.
j			3,920.
k			65,751.
l			12,322.
m			-1,099.
n			59,186.
o			-39,159.

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	-39,250.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	}	3	N/A

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
				MANNER ACQUIRED	DATE ACQUIRED DATE SOLD
23 SHS, CALL SUNOCO				PURCHASED	01/15/10 05/17/10
	6,072.	7,539.	0.	0.	-1,467.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
				MANNER ACQUIRED	DATE ACQUIRED DATE SOLD
39 SHS, CALL CMCSK				PURCHASED	08/23/10 11/30/10
	3,209.	6,758.	0.	0.	-3,549.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
				MANNER ACQUIRED	DATE ACQUIRED DATE SOLD
3,000 SHS, BJ SERVICES CO				PURCHASED	06/11/07 04/30/10
	8,070.	8,070.	0.	0.	0.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
BAKER HUGHES INC - CASH IN LIEU					
	2.	3.	0.	0.	-1.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
2,300 SHS, SUNOCO					
	63,998.	54,008.	0.	0.	9,990.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,201 SHS, BAKER HUGHES INC					
	43,706.	78,362.	0.	0.	-34,656.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
2,000 SHS, PRECISION DRILLING					
	13,377.	54,523.	0.	0.	-41,146.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
3,000 SHS, GENERAL ELECTRIC	PURCHASED	07/12/07	06/08/10		
44,969.	115,760.	0.	0.	-70,791.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
2,500 SHS, AT&T	PURCHASED	08/26/09	11/30/10		
68,805.	67,356.	0.	0.	1,449.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
2,500 SHS, CLEARBRIDGE ENERGY MLP	PURCHASED	06/24/10	11/30/10		
52,452.	48,532.	0.	0.	3,920.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD			
3,950 SHS, COMCAST CORP	PURCHASED	11/03/88	11/30/10		
74,068.	70,863.	0.	0.	3,205.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
500 SHS, HOME DEPOT	15,052.	24,870.	0.	0.	-9,818.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
2,000 SHS, ELI LILLY & CO	66,963.	68,062.	0.	0.	-1,099.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
2,000 SHS, MEDTRONIC INC	66,906.	96,420.	0.	0.	-29,514.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
4,000 SHS, PFIZER INC	64,746.	103,905.	0.	0.	-39,159.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	-212,636.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	AMOUNT
BANK OF AMERICA	97.
CREDIT SUISSE	4.
LEM REAL ESTATE MESSANINE FUND II	84.
MORGANSTANLEY SMITHBARNEY	152.
STATE OF ISRAEL	298.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	635.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
MORGAN STANLEY SMITH BARNEY	13,264.	0.	13,264.
TOTAL TO FM 990-PF, PART I, LN 4	13,264.	0.	13,264.

FORM 990-PF OTHER INCOME STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FROM PARTNERSHIPS	686.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	686.	0.	

FORM 990-PF ACCOUNTING FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	10,500.	7,000.		3,500.
TO FORM 990-PF, PG 1, LN 16B	10,500.	7,000.		3,500.

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
STATE FILING FEE	35.	0.		35.	
BANK CHARGES	120.	120.		0.	
TO FORM 990-PF, PG 1, LN 23	155.	120.		35.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
MARKETABLE SECURITIES	0.	0.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	0.	0.		

FORM 990-PF	CORPORATE BONDS		STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
MARKETABLE SECURITIES	38,000.	38,000.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	38,000.	38,000.		

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
PARTNERSHIP	COST	198,973.	180,923.	
PARTNERSHIP	COST	446,590.	438,373.	
TOTAL TO FORM 990-PF, PART II, LINE 13		645,563.	619,296.	

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
WILLIAM M. MARCUS 99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	TRUSTEE 10.00	0.	0.	0.
CYNTHIA S. MARCUS 99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	TRUSTEE 1.00	0.	0.	0.
DANIEL H. MARCUS 99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	TRUSTEE 1.00	0.	0.	0.
MELANIE L. MARCUS 99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	TRUSTEE 1.00	0.	0.	0.
RICHARD S. MARCUS 99-50 FLORENCE STREET CHESTNUT HILL, MA 024671935	TRUSTEE 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 11

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AMERICAN CHESTNUT FOUNDATION 205 SPEAR STREET SOUTH BURLINGTON, VT 05403	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	300.
AMERICAN JEWISH COMMITTEE 126 HIGH STREET BOSTON, MA 02110	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	11,650.
AMERICAN TECHNION SOCIETY 1 GATEWAY CTR #515 NEWTON, MA 02458	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	6,350.
B S JEWISH FILM FESTIVAL 1001 WATERTOWN STREET NEWTON, MA 02465	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,500.
BABSON COLLEGE 231 FOREST STREET BABSON PARK, MA 02457	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	5,000.
BARNSTORMERS PO BOX 434, 104 MAIN STREET TAMWORTH, NH 03886	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
BELMONT GOLF SCHOLARSHIP FUND 181 WINTER STREET BELMONT, MA 02478	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	150.
BETH ISRAEL DEACONESS MEDICAL CENTER 330 BROOKLINE AVE BOSTON, MA 02115	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	25.

BROOKLINE COMMUNITY FOUNDATION 40 WEBSTER PLACE BROOKLINE, MA 02445	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	5,250.
CAMP HALE 333 NAHANTON STEET NEWTON CENTER, MA 02459	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
CHABAD LUBAVITCH 7 CAMELOT PLACE MANCHESTER, NH 03104	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	500.
COMBINED JEWISH PHILANTHROPIES 126 HIGH STREET BOSTON, MA 02110	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	62,500.
DANA FARBER 44 BINNEY STREET BOSTON, MA 02115	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	25.
FACING HISTORY 16 HURD ROAD BROOKLINE, MA 02445	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,500.
FRIENDS OF ISRAEL DEFENSE FORCES 154 WELLS AVE NEWTON, MA 02459	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	20,800.
FRIENDS OF YEMIN ORDE 4501 CONNECTICUT AVEENUE, NW, SUITE 813 WASHINGTON, DC 20008	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	5,000.
GANN ACADEMY 333 FOREST STREET WALTHAM, MA 02452	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	25,075.
GATEWAYS FOR EDUCATION 333 NAHANTON STEET NEWTON, MA 02459	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,500.

WILLIAM AND CYNTHIA MARCUS FAMILY CHARIT

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GROW CLINIC BOSTON MEDICAL CENTER BOSTON, MA 02118	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,500.
HEBREW SENIOR LIFE 1200 CENTRE STREET ROSLINDALE, MA 02131	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	10,000.
JEWISH COMMUNITY CENTER 333 NAHANTON STEET NEWTON, MA 02459	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	5,250.
JEWISH FEDERATION 126 HIGH STREET BOSTON, MA 02110	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	12,500.
JEWISH INSTITUTE FOR NATIONAL SECURITY AFFAIRS 1307 NEW YORK AVE, NW, SUITE 200 WASHINGTON, DC 20005	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,500.
JEWISH THEOLOGICAL SEMINARY 3080 BROADWAY NEW YORK, NY 10027	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,500.
JIMMY FUND 44 BINNEY STREET BOSTON, MA 02115	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
LAKES REGION UNITED WAY 95 WATER STREET LACONIA, NH 03246	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	500.
LAWERENCE SCHOOL 27 FRANCIS STREET BROOKLINE, MA 02445	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,500.
MACCABI USA SPORTS 1926 ARCH STREET 4R PHILADELPHIA, PA 19103	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	500.

MASSACHUSETTS GENERAL HOSPITAL 55 FRUIT STREET BOSTON, MA 02114	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 25 CARLETON STREET CAMBRIDGE, MA 02142	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	10,000.
METRO WEST DAY SCHOOL 29 UPPER JOCLYN AVE. FRAMINGHAM, MA 01701	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	4,300.
MISHKAN TEFILA 300 HAMMOND POND PARKWAY CHESTNUT HILL, MA 02467	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	9,000.
NE FORESTRY FOUNDATION 32 FOSTER STREET LITTLETON, MA 01460	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
NH MUSIC FESTIVAL NEW HAMPSHIRE MUSIC FESTIVAL CENTER HARBOR, NH 03226	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
NR BAPTIST HOSPITAL NEW ENGLAND BAPTIST HOSPITAL BOSTON, MA 02120	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
PINE STREET INN 444 HARRISON AVE BOSTON, MA 02118	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
PROJECT BREAD 145 BORDER STREET BOSTON, MA 02128	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
SILENT SPRING INSTITUTE 29 CRAFTS STREET NEWTON, MA 02458	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	250.

SMITH LEADERSHIP ACADEMY SCHOOL 23 LEONARD STREET DORCHESTER, MA 02122	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,500.
SQUAM LAKES SCIENCE CENTER 23 SCIENCE CENTER ROAD HOLDERNESS, NH 03245	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,750.
TEMPLE BETH ELOHIM 10 BETHEL ROAD WELLESLEY, MA 02481	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	5,000.
TEMPLE ISRAEL 477 LONGWOOD AVE. BOSTON, MA 02215	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	5,675.
UNITED WAY 222 FORBES ROAD BRAINTREE, MA 02184	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,500.
ZAMIR CHORALE 1320 CENTRE STREET NEWTON CENTER, MA 02459	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	180.
BASEBALL HALL OF FAME 25 MAIN STREET COOPERSTOWN, NY 13326	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	15.
BETH EL TEMPLE 2 CONCORD AVENUE BELMONT, MA 02478	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	50.
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	25.
CHILDRENS HOSPITAL BOSTON 300 LONGWOOD AVENUE BOSTON, MA 02115	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	300.

WILLIAM AND CYNTHIA MARCUS FAMILY CHARIT

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CIRCLE PROGRAM 85 MAIN STREET PLYMOUTH, NH 03264	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
CROHNS & COLITIS FOUNDATION OF AMERICA - NEW ENGLAND CHAPTER 280 HILLSIDE AVENUE NEEDHAM, MA 02494	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,100.
GREENWOOD HOUSE PO BOX 2734 VINEYARD HAVEN, MA 02568	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	500.
UNIVERSITY OF MASSACHUSETTS AMHERST 288 NORTH PLEASANT STREET AMHERST, MA 01002	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
THE ISRAEL PROJECT 2020 K STREET NW WASHINGTON, DC 20006	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,000.
JEWISH DISTRIUTION COMMITTEE 132 EAST 43RD STREET, PO BOX 530 NEW YORK, NY 10017	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	550.
LAKES REGION CONSERVATION TRUST 156 DANE RD CENTER HARBOR, NH 03226	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
LUNA PRESERVATION SOCIETY PO BOX 1866 BROOKLINE, MA 02446	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
THE MIDDLE EAST MEDIA RESEARCH INSTITUTE PO BOX 27837 WASHINGTON, DC 20038	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
EXPECT MIRACLES FOUNDATION 6 QUAIL RUN HINGHAM, MA 02403	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	250.

WILLIAM AND CYNTHIA MARCUS FAMILY CHARIT

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NETWORK FOR THE GOOD 7920 NORFOLK AVENUE BETHESDA, MD 20814	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,500.
PARTNERS FOR EXCELLENCE IN JEWISH EDUCATION 88 BOARD STREET BOSTON, MA 02110	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	2,000.
PLANNED PARENTHOOD 1055 COMMONWEALTH AVENUE BOSTON, MA 02215	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
TORAH ACADEMY 11 WILLISTON ROAD BOSTON, MA 02445	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
AMERICAN FRIENDS OF MAGEN DAVID ADOM - NEW ENGLAND PO BOX 600714 NEWTON, MA 02460	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	100.
LET KIDS BE KIDS 9559 SAND POINT WAY NE SEATTLE, WA 98115	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	200.
BROOKLINE HIGH SCHOOL 21ST CENTURY FUND 115 GREENOUGH STREET BROOKLINE, MA 02445	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	6,000.
COLBY COLLEGE 4000 MAYFLOWER HILL WATERTOWN, ME 04901	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	1,000.
FROM PARTNERSHIP	N/A TO FURTHER ENTITY'S EXEMPT PURPOSE	PUBLIC CHARITY	22.

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

250,542.