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1 Form \$90-PF

Department of the Treasury Internal Revenue Service

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

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

2011

For calendar year 2011 or tax year beginning , and ending Name of foundation A Employer identification number ANNE AND PAUL MARCUS FAMILY FOUNDATION 01-6220476 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 6TH FI 617 556 5200 260 FRANKLIN STREET City or town, state, and ZIP code C If exemption application is pending, check here BOSTON, MA G Check all that apply: Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, 2, check here and attach computation Address change Name change H Check type of organization: Section 501(c)(3) exempt private foundation E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J Accounting method: X Cash Accrual If the foundation is in a 60-month termination Other (specify) (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here 2,629,969. (Part I, column (d) must be on cash basis.) ▶\$ Part I | Analysis of Revenue and Expenses (d) Disbursements for charitable purposes (cash basis only) (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) expenses per books income income Contributions, gifts, grants, etc., received 2 Check X If the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 119 119. 119.STATEMENT 23,966 STATEMENT 23,966. 23,860. 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) -85,639 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 1,852,701. 0 7 Capital gain net income (from Part IV, line 2) 0 8 Net short-term capital gain 9 Income modifications RECEIVED Gross sales less returns 10a and allowances b Less Cost of goods sold c Gross profit or (1953) 11 Other income 554 979 24,085 Total. Add lines 1 through TIMES 0. 0. Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 1,000. STMT 3 3,452 1,000. 2,452. **b** Accounting fees 138,553 138,553. c Other professional fees STMT 4 0. 0. 17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications STMT 5 1,550 915 915 635. 23 Other expenses 24 Total operating and administrative 143,555 1,915 1,915. 141,640. expenses. Add lines 13 through 23 957,100 957,100. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 1,100,655 .915 1.915 1,098,740. Add lines 24 and 25 27 Subtract line 26 from line 12: <u>-1,162,209</u> a Excess of revenue over expenses and disbursements 22,064 b Net investment income (if negative, enter -0-) 22,170 C Adjusted net income (if negative, enter -0-)

Б	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	f year
<u>_</u>	ai t	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	3.		
	2	Savings' and temporary cash investments	2,574,852.	2,410,491.	2,410,491.
	3	Accounts receivable 803.			
		Less; allowance for doubtful accounts ▶	4,823.	803.	803.
	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 ▶			
ţ	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
⋖	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 6	1,174,990.	184,682.	<u> 176,164.</u>
	С	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 7	46,727.	43,210.	42,511.
	14	Land, buildings, and equipment: basis ▶			
		Less accumulated depreciation			
	15	Other assets (describe)			<u></u>
	16	Total assets (to be completed by all filers)	3,801,395.	2,639,186.	<u>2,629,969.</u>
	17	Accounts payable and accrued expenses			
	18	Grants payable			
es	19	Deferred revenue			
Ħ	20	Loans from officers, directors, trustees, and other disqualified persons			
Liabilities	21	Mortgages and other notes payable			
_	22	Other liabilities (describe)			
				ا ۾	
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
ģ		and complete lines 24 through 26 and lines 30 and 31.			
ĕ		Unrestricted Taxas and the standards			
lala	25	Temporarily restricted			
ᅙ	26	Permanently restricted Foundations that do not follow SFAS 117, check here		<u> </u>	
Ξ		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
þ	27	Capital stock, trust principal, or current funds	0.	0.	
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Net Assets or Fund Balance	29	Retained earnings, accumulated income, endowment, or other funds	3,801,395.	2,639,186.	
e (30	Total net assets or fund balances	3,801,395.	2,639,186.	
Z	00	Total net assets of fund balances	3,001,333.	2,033,100.	
	31	Total liabilities and net assets/fund balances	3,801,395.	2,639,186.	
_				2700372001	
LP	art	Analysis of Changes in Net Assets or Fund Ba	aiances		
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line	30		
		st agree with end-of-year figure reported on prior year's return)		1	3,801,395.
		r amount from Part I, line 27a		2	-1,162,209.
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3	. -	4	2,639,186.
		eases not included in line 2 (itemize)		5	0.
		net assets or fund halances at end of year (line 4 minus line 5) - Part II, co	lumn (h) line 30	6	2 639 186

ANNE AND PAUL MARCUS FAMILY FOUNDATION

01-6220476

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Form **990-PF** (2011)

Form 990-PF (2011)

(a) List and descri	ibe the kind(s) of property sold (e.g.,	real estate,	Income	(b) H	low acquired - Purchase	(c) Date	acquired	(d) Date sold
2-story brick war	ehouse; or common stock, 200 shs.	MLC Co.)		D-	- Donation	(mo., c	lay, yr.)	(mo., day, yr.)
a b SEE ATTACHED	STATEMENT							
C DEE ATTACHED	DIAIMMI							
d								
<u>e </u>				<u> </u>				
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale			(h) G (e) plu:	ain or (loss) s (f) minus (g)
a l				-+				
						·		
1,852,701.			1,938,34	10.				-85,639
Complete only for assets showing	g gain in column (h) and owned by th						Col. (h) gaın not less thar	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (ı) col. (ı), ıf any				(from col. (i	
ı								
								-85,639
Capital gain net income or (net cap	ortal loss) { If gain, also enter in	ın Part I, line ın Part I, line	7 7	}	2			-85,639
Net short-term capital gain or (loss	s) as defined in sections 1222(5) and	l (6):						
If gain, also enter in Part I, line 8, of (loss), enter -0- in Part I, line 8	column (c).			 	_			
II (IOSS), efficiency in Part I line o					9 1			_ 26 961
Part V Qualification U	nder Section 4940(e) for I	Reduced	Tax on Net	: Inve	_ ₃ estment In	come		<u>-86,961</u>
Part V Qualification U	nder Section 4940(e) for I					come		<u>-86,961</u>
Part V Qualification Unor optional use by domestic private	foundations subject to the section 49					come		<u>-86,961</u>
Part V Qualification Unor optional use by domestic private	foundations subject to the section 49					come		
Part V Qualification Unor optional use by domestic private section 4940(d)(2) applies, leave the section that the section the section that is the foundation liable for the section that is the foundation liable for the section that is the section that it is the section that is the section that it is the section that it is the section that it is the section that i	foundations subject to the section 49 is part blank. Is on 4942 tax on the distributable amo	940(a) tax on	net investment in	ncome.		come		
Part V Qualification Unor optional use by domestic private section 4940(d)(2) applies, leave the section 4940(d)(2) applies, leave the foundation liable for the section are section of the section of	foundations subject to the section 49 is part blank. Is on 4942 tax on the distributable amo fy under section 4940(e). Do not com	940(a) tax on ount of any ye nplete this pa	net investment in ear in the base pe rt.	ncome.		come		
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Part V Qualification Unor optional use by domestic private section 4940(d)(2) applies, leave the as the foundation liable for the section 4940(d)(2) applies, leave the as the foundation liable for the section 4940(d)(2) applies, leave the as the foundation does not qualified in the section 4940(d) as period years are called a year (or tax year beginning 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the 5 the foundation has been in existen	foundations subject to the section 49 is part blank. Is part	ount of any yearplete this pactions before abutions 3,905. 9,017. L,714. 3,321. 0,087.	net investment in ar in the base per rt. making any entri Net value of no	riod? es. (c) pnchari 3, 5, 6, 5,	table-use asset , 654, 48 , 150, 28 , 257, 89 , 470, 41 , 602, 85	s 4. 2. 9. 2. 5.	(col. (b) divi	Yes X No (d) ution ratio ded by col. (c)) • 40057 • 40367 • 44826 • 43325 • 18385 1.86961 • 37392
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Part V Qualification United Section 4940(d)(2) applies, leave the se	foundations subject to the section 49 is part blank. Is part	ount of any yearplete this pactions before abutions 3,905. 9,017. L,714. 3,321. 0,087.	net investment in ar in the base per rt. making any entri Net value of no	riod? es. (c) pnchari 3, 5, 6, 5,	table-use asset , 654, 48 , 150, 28 , 257, 89 , 470, 41 , 602, 85	3 4 5	(col. (b) divi	Yes X No (d) ution ratio ded by col. (c))
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Part V Qualification University of net investment income Add lines 5 and 6 Enter qualifying distributions from Apalus 5 and 6 Enter qualifying distributions from Apalus 5 and 6 Enter qualifying distributions from Apalus 5 and 6 Enter qualifying distributions from	foundations subject to the section 49 is part blank. Is part	ount of any yearplete this pactions before bubutions 3,905. 9,017. 1,714. 3,321. 0,087. In line 2 by 5, and 15	net investment invertible and the base perit. Met value of note that the base perit. Net value of note that the base perit.	riod? es. (c) onchari 3, 5, 6, 7	table-use asset, 654, 48, 150, 28, 257, 89, 470, 41, 602, 85	2	(col. (b) divi	Yes X N (d) ution ratio ded by col. (c))

	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 49	$\frac{11-622}{11-622}$			Page 4
		40 - See	e instru	ICHO	nsj
1a	Exempt operating foundations described in section 4940(d)(2), check here \(\bigs \) 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 I and enter 1%	1		4	41.
	of Part I, line 27b				
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				_
	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		4	41.
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		4	41.
	Credits/Payments:				
	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 4,788.	Ì			
b	Exempt foreign organizations - tax withheld at source				
C	Tax paid with application for extension of time to file (Form 8868) 6c	l			
d	Backup withholding erroneously withheld 6d				
7	Total credits and payments. Add lines 6a through 6d	7		<u>4,7</u>	88.
	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		4,3	47.
	Enter the amount of line 10 to be: Credited to 2012 estimated tax	11			_0.
Pa	rt VII-A Statements Regarding Activities				
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in	1	<u> </u>	Yes	+
	any political campaign?		1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?		1b	<u> </u>	X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published	or			1
	distributed by the foundation in connection with the activities.				
	Did the foundation file Form 1120-POL for this year?		1c		X_
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:				
	(1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation		ŀ		
_	managers. ▶ \$			•	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or				
J	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		x
42	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	,	5		х
-	If "Yes," attach the statement required by General Instruction T.				
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 lateral states are stated from the state of the sta	aw.			•
	remain in the governing instrument?		6	х	•
7	Did the foundation have at least \$5,000 in assets at any time during the year?		7	Х	
	If "Yes," complete Part II, col. (c), and Part XV.				
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		8b	Х	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendary	lar			
	year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		9_	X	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10		X
		F	orm 990	-PF	(2011)

	1990-PF (2011) ANNE AND PAUL MARCUS FAMILY FOUNDATION 01-62:	<u> 20476</u>		Page 5
Pa	art 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 make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
	If "Yes," attach statement (see instructions)	12		<u>X</u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A			
14	The books are in care of ▶ THE CORPORATION Telephone no. ▶ 617	<u> 556 5</u>	200	
	Located at ► 260 FRANKLIN STREET, BOSTON, MA ZIP+4 ►	<u>)2110</u>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		>	\cdot
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign	-		
	country			
Pa	art 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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	İ		
	(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)?			
	(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.)			
þ	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 instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	, '		
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected]		
	before the first day of the tax year beginning in 2011?	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)):			
а	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
	before 2011?			
	If "Yes," list the years \blacktriangleright			
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?			
þ	If "Yes," did it have excess business holdings in 2011 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 2011.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		<u>X</u>
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 2011?	4b		<u> </u>
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Part VII-B Statements Regarding Activities for Which F			U1-644U4	: / 0	Page 6
	Orini Trzo Way De F	iequireu (contin	ueu)		
5a During the year did the foundation pay or incur any amount to:	4045(5)\0		es X No		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section			ן מא בבו אי		
(2) Influence the outcome of any specific public election (see section 4955); o any voter registration drive?	i to carry on, unechy or mune		s X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes'	2		es X No		
(4) Provide a grant to an individual for travel, study, or other similar purposes			3 (22) 110		
509(a)(1), (2), or (3), or section 4940(d)(2)?	i described in section	□ v _é	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational nurnoses, or f				
the prevention of cruelty to children or animals?	or cododitional purposes, or r		es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unc	ler the exceptions described i			1	
section 53.4945 or in a current notice regarding disaster assistance (see instru			N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	·			<u> </u>	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr		ined	-		
expenditure responsibility for the grant?		「/A □ Ye	es 🔲 No		
If "Yes," attach the statement required by Regulations section 53 4945	5-5 <i>(d).</i>				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p					
a personal benefit contract?		Ye	es X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			6Ь	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 s		Ye	es 🗶 No 📙		
b If "Yes," did the foundation receive any proceeds or have any net income attribu				7b	
Part VIII Information About Officers, Directors, Trusto Paid Employees, and Contractors		nagers, Highly	<i>,</i>		
List all officers, directors, trustees, foundation managers and their		1.0	(d) 0		
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid.	(d) Contributions to employee benefit plans and deferred	(e)	Expense unt, other
	to position	(If not paid, enter -0-)	compensation	allo	owances
	TRUSTEE				
77 HEATH STREET	0 00		_		^
BROOKLINE, MA 02445	8.00 TRUSTEE	0.	0.		<u> </u>
	TRUSTEE				
77 HEATH STREET BROOKLINE, MA 02445	2.00	٥.	0.		0.
	TRUSTEE				
PIPER RUDNICK, 33 ARCH STREET, 26TH F	11100122				
BOSTON, MA 02110	0.00	0.	0.		0.
				<u></u>	
Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to		r
(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	acco allo	Expense unt, other owances
NONE					
	_				
				ļ	
		_			
				1	-
Cotal number of other employees paid over \$50,000	<u> </u>			L	

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Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	on Managers, Hi	ghly 	
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		(c) Compensation
	DESIGN/IMPL	EMENTATI(
	N OF AUTISM		
	DESIGN/IMPL		
77 MASS AVE, 46-6237, CAMBRIDGE, MA 02139	N OF AUTISM	RESEARCI	50,000.
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	<u> </u>		0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical number of organizations and other beneficiaries served, conferences convened, research papers produced.	ced, etc.		Expenses
1 DESIGN AND IMPLEMENTATION OF AUTISM RESEARCH	COORDINATIO	N	
AND MANAGEMENT OF THE AUTISM CONSORTIUM.			
			135,628.
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 lin	es 1 and 2.		Amount
1 <u>N/A</u>			
2			
All other program-related investments. See instructions. 3			
Total. Add lines 1 through 3		•	0.
reserved and a second a second and a second		<u>-</u>	

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions) Part X Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 3,349,235. a Average monthly fair market value of securities 1a Average of monthly cash balances 1b c Fair market value of all other assets 1c 3,349,235. 1d d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 1<u>e</u>_ 0. 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets $3,\overline{349}$ 3 Subtract line 2 from line 1d 50,239 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 3,298,996 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 Minimum investment return. Enter 5% of line 5 164,950 Distributable Amount (see instructions) (Section 4942(1)(3) and (1)(5) private operating foundations and certain Part XI foreign organizations check here \(\neq \) and do not complete this part.) Minimum investment return from Part X, line 6 Tax on investment income for 2011 from Part VI, line 5 Income tax for 2011. (This does not include the tax from Part VI.) c Add lines 2a and 2b 2c 3 Distributable amount before adjustments. Subtract line 2c from line 1 Recoveries of amounts treated as qualifying distributions 4 Add lines 3 and 4 5 6 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1,098,740. 1a b Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 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 1,098,740. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 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 6 Adjusted qualifying distributions. Subtract line 5 from line 4 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

Form **990-PF** (2011)

4940(e) reduction of tax in those years.

(a) (b) (c) (d) Corpus Years prior to 2010 2011 1 Distributable amount for 2011 from Part XI, Intel 2 2 Uses handled mount for 2010 only 1 Entir amount for 2010 only 1 Entire amount for 2011 from 2011 1 From 2009 4 From 2010 1 Froat of loss 38 through 6 4 Qualifying distributions on 2011 from Part XII, Intel XII State of	Part XIII Undistributed Income (se	ee instructions)	N/A		
1. Distributible amount for 2011 from Part XI, into ? 2. Undestributed amount, af any, as at the end of 2011 a Finder amount for 2010 only b Total for prior years: 3. Excess distributions carryover, if any, to 2011: a From 2006 b From 2007 c From 2008 d From 2009 e From 2010 1 Total for line 3 at through e 4. Qualifying distributions to 2011 from Part XII, line 4; line 3 at through e 7 Total of line 3 at through e 4. Qualifying distributions to 2011 from Part XII, line 4; line 3 at through e 5. Applied to 2016, but not more than line 2 a Applied to 2016 but not more than line 2 a Applied to 2016 charbot abused on correct years (Election required - see instructions) 1 Treated as distributions out of corruss (Election required - see instructions) 2 Fraedra distributions out of corruss (Election required - see instructions) 3 Gapted to 2011 distributible amount 6 Peramamag amount distribution acrony was register as 5 °°. 5. See authoritions corry vary register as 5 °°. 5. See authoritions corry vary register as 5 °°. 5. See authoritions corry vary register as 5 °°. 5. Carea Addritions All, and 46 Subrated line 3 of the form into 2 to the correct of the cor	,		(b)		
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a Enter amount for 2010 only b Total for pror years: 2 Excess destributions curryover, if any, to 2011: a From 2006 b From 2007 c From 2009 d From 2009 d From 2009 1 Total of lines 3s through e 1 Cutalitying distributions for 2011 from Part XII, line 4: ▶ S 2 Applied to 2010, but not more than line 2a 2 Applied to 2010, but not more than line 2a 3 Applied to 2010, but not more than line 2a 3 Applied to 2010, but not more than line 2a 3 Applied to 2011 distributions out of corpus (Eaction required - see instructions) c Treated as distributions out of corpus (Eaction required - see instructions) c Treated as distributions out of corpus (Eaction required - see instructions) c Excess destribution curryover applied about more referenced to the computer of the corpus (Eaction required - see instructions) c Excess destribution curryover applied to 2011 must be office in a column 1a) indicated below: 2 Cappias Assistmes 34.4, and 46 Subread line 3 3 Prior years' undistributed during the seed of the column 2s indicated below: 3 Cappias Assistmes 34.4, and 46 Subread line 3 4 Prior years' undistributed incomes. Subtract line 4 from line 2b 5 Enter the amount of prior years' undistributed income for which line section 494(2) lax has been prioreusly assessed. 4 Enter the amount of prior years' undistributed income for 2010. Subtract line 4a from line 2b. Traable amount - see instructions 4 and 5 from line 1. This amount must be destributed in 2012 7 Amounts treated as distributions out of corpus to sastive requirements imposed by section 170(b)(1)(1) or 494(2)(3) 8 Excess destributions curryover from 2006 not applied on line 5 or line 7 Excess form 2010 5 Excess from 2010 6 Excess from 2011					
3 Excess distributions carryover, if any, to 2011: a From 2006 b From 2007 c From 2008 d From 2010 1 Total of lines 3a through a 4 Quashying distributions for 2011 from Part XII, line 4 ► S a Applied to 2010, but not more than line 2a b Applied to undistributed income of proor years ((Exclion required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) d Applied to 2011 distributable amount e Remaining amount distributed out of corpus c Clerch and the State of the St	2 Undistributed income, if any, as of the end of 2011	•			
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S Excess distributions carryover, if any, to 2011: a From 2006 b From 2007 c From 2008 d From 2009 d From 2009 d From 2009 e From 2010 1 Total of lines a through e Oualitying distributions for 2011 from Part XIII, line 4: ▶ S A pupiled to undistributied mome than line 2a b Applied to undistributied mome of prior years (Election required - see instructions) c Treated as distributions out of copus (Election required - see instructions) d Applied 2011 distributible amount e Remaining amount distribution du of copus (Election required - see instructions) d Applied 2011 distributible amount e Remaining amount distribution du of copus (Election required - see instructions) d Forest effection required - see instructions) 6 Enter the not total of each outine as indicated below. 8 Carpus Add lines 3! 4e, and 6 Subfast line 5 b Prior years' unidistributed encome for which in notice of discinacy has been asset, or on which the section 4942(6) tax has been previously assessed 9 Subtract line 6 from line 6 b. Taxable amount - see instructions undistributed income for which a notice of discinacy has been asset, or on which the section 4942(6) tax has been previously assessed 9 Subtract lines 6 from line 6 b. Taxable amount - see instructions undistributed income for 50110. Subtract line 4 at from line 2. Taxable amount - see instructions undistributed income for 50110. Subtract line 4 at from line 2. Taxable amount unsub be distributed income for 942(0) tax has been previously assessed 9 Subtract line 6 of from line 6 b. Taxable 1 Undistributed income for 2011. Subtract line 4 at from line 2. Taxable amount unsub be distributed income for 942(0) tax has been previously assessed 9 Subtract line 6 of from line 6 b. Taxable 1 Another and 1				- "	
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From 2007 From 2009 From 2010 Total of lines 3a through e 4 Qualifying distributions for 2011 from Part XII, line 4 ₱ ► \$ a Applied to 2010, but not more than line 2a b Applied to undistributed income of prior years (Delchoin required - see instructions) Freated as distributions on oil of corpus (Election required - see instructions) A Applied to 2011 distributable amount of Remaining amount distributed out of corpus Election required - see instructions) A compact of a see that the same amount must be above in column as indicated below. Enter the not total of each column as indicated below. 3 Corpus Add Intel 34, 4, and 46 Subtreat line 5 Prior years' undistributed income, Subtract line 5 Prior years' undistributed income, Subtract line 5 Prior years' undistributed income (Subtract line 5) Brior the amount of prior years' undistributed income (Subtract line 5) Brior years' undistributed income (Subtract line 6) Brior years' undistributed (Subtract line 6) Brior years' undistributed (Subtract line 6) Bri	3 Excess distributions carryover, if any, to 2011:	· - -			
e From 2009 d From 2009 f Total of lines 3a through e 4 Ouallying distributions for 2011 from Part XII, line 4 ► S a Applied to 2010, but not more than line 2a b Applied to misstrabited income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2011 distributiable amount e Remaining amount distributed out of corpus 5 Excess distributions caryower applied by 2011 must be absent incolumn (a)) 6 Enter the net lotal of each column as indicated below: 1 Cerpus Add Iren 24 4, and 46 Bubbact line 5 b Phor years' undestributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undestributed income for which a notice of deforeinty has been esseud, or on which in essection 4992 (a) know her previously assessed d Subtract line 6b from line 6b. Taxable amount - see instructions e Undestributed income for Verification at 1 Indistributed income for Verification at 1 Indistributed income for Verification at 1 Indistributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instructions e Undestributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instructions e Undestributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instructions e Undestributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instructions e Undestributed income for 2011 Subtract line 4a from line 2a. Taxable amount - see instructions e Undestributed income for 2010 (1) (1) (1) (1) (1) (1) (2) (2) (3) (3) (3) (3) (3) (3) (4) (4) (4) (4) (4) (4) (4) (4) (4) (4					
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d Excess from 2010 e Excess from 2011					1
e Excess from 2011	c Excess from 2009				
	d Excess from 2010				
- 000 BE	e Excess from 2011				<u> </u>

Part XIV Private Operating Fo	OUNDATIONS (See Ins			U1-62	120416 raye 10
1 a If the foundation has received a ruling of			71, 44001101107		
foundation, and the ruling is effective for					
b Check box to indicate whether the found	•	=	n section X	4942(j)(3) or 4	942(1)(5)
2 a Enter the lesser of the adjusted net	Tax year	ig louildation described in	Prior 3 years	4042())(0) 01 4	T
income from Part I or the minimum	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
investment return from Part X for	<u> </u>				
each year listed	22,170.	28,678.	22,985.	91,999.	165,832.
b 85% of line 2a	18,845.	24,376.	19,537.	78,199	
c Qualifying distributions from Part XII,	20/0200			, , , _ , ,	
line 4 for each year listed	1,098,740.	1.464.192.	2.079.247.	3,704,703	8,346,882.
d Amounts included in line 2c not				, , , , , , , , , , , , , , , , , , , ,	
used directly for active conduct of					
exempt activities	963,110.	1,276,004.	1,744,189.	3,352,993.	7,336,296.
e Qualifying distributions made directly			·		
for active conduct of exempt activities.					
Subtract line 2d from line 2c	135,630.	188,1 <u>88</u> .	335,058.	351,710.	1,010,586.
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					0.
(2) Value of assets qualifying	:				
under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter				•	0.
2/3 of minimum investment return					
shown in Part X, line 6 for each year listed	109,967.	121,816.	171,676.	275,263.	678,722.
c "Support" alternative test - enter:	100,007.	121,010.	1/1,0/0.	273,203	010,122.
(1) Total support other than gross					
investment income (interest,					
dividends, rents, payments on					
securities loans (section 512(a)(5)), or royalties)					0.
(2) Support from general public					
and 5 or more exempt organizations as provided in					
section 4942(j)(3)(B)(iii)					0.
(3) Largest amount of support from					_
an exempt organization					0.
(4) Gross investment income		ta Alaia mantamba	:	b = d &E 000 ar m	0.
Part XV Supplementary Info at any time during t			it the foundation	nad \$5,000 or m	ore in assets
		uctions.j		·	
 Information Regarding Foundation List any managers of the foundation who 	-	than 20% of the total centr	ributions received by the	foundation before the clo	nea of any tay
year (but only if they have contributed in			ibutions received by the	ioundation before the cit	ise of any tax
SEE STATEMENT 8	. , ,				
b List any managers of the foundation who	o own 10% or more of th	e stock of a corporation (or an equally large portio	n of the ownership of a r	partnership or
other entity) of which the foundation has			,		
NONE					
2 Information Regarding Contributi	ion, Grant, Gift, Loan,	Scholarship, etc., Pr	ograms:		
Check here ▶ ☐ If the foundation o					
the foundation makes gifts, grants, etc.	(see instructions) to indiv	iduals or organizations u	nder other conditions, co	mplete items 2a, b, c, an	<u>d d</u>
a The name, address, and telephone num	ber of the person to whor	n applications should be	addressed:		
SEE STATEMENT 9					
b The form in which applications should b	e submitted and informat	tion and materials they sh	rould include:		
c Any submission deadlines:					
d Annuactuation of the state of	a guah ag hir an annah ir i	l orana abandakia fisika	kında afınatıtırıtırını == ==	ther feeters:	
d Any restrictions or limitations on awards	s, such as by geographica	n areas, charnadie fields,	KINGS OF HISHLUHONS, OF O	mer laciors.	
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ANNE AND PAUL MARCUS FAMILY FOUNDATION 01-6220476 Form 990-PF (2011) Supplementary Information (continued) Part XV Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or Foundation show any relationship to status of contribution Amount any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year AUTISM CONSORTIUM NONE PUBLIC CHARITY UNRESTRICTED 75 PARK PLAZA BOSTON, MA 02116 125,000, FIDELITY CHARITABLE GIFT FUND PUBLIC CHARITY UNRESTRICTED NONE PO BOX 77001 CINNCINNATI, OH 45277 125,000. BIG APPLE CIRCUS NONE PUBLIC CHARITY UNRESTRICTED ONE METROTEC CENTER, 3RD FLOOR BROOKLYN, NY 11201 2,500. DANA FARBER MARATHON CHALLENGE NONE PUBLIC CHARITY UNRESTRICTED 108 GOVERNORS ROAD MILTON, MA 02186 500. FAMILIES FIRST NONE PUBLIC CHARITY UNRESTRICTED 99 BISHOP RICHARD ALLEN DRIVE CAMBRIDGE MA 02139 1,000. SEE CONTINUATION SHEET(S) **▶** 3a Total 957,100. b Approved for future payment NONE

▶ 3b

Tota!

ANNE AND PAUL MARCUS FAMILY FOUNDATION 01-6220476

Part XV Supplementary Information				
3 Grants and Contributions Paid During the	 _			
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
EMERALD NECKLACE CONSERVANCY	none	PUBLIC CHARITY	UNRESTRICTED	
PO BOX 300699				
JAMAICA PLAIN, MA 02130				2,500
FIRST PARISH IN BROOKLINE	NONE	PUBLIC CHARITY	IND POWD TOWED	
382 WALNUT STREET	NONE	FOBLIC CHARITI	ONRESTRICTED	
BROOKLINE, MA 02445				10,000
•				
PARK SCHOOL	NONE	PUBLIC CHARITY	UNRESTRICTED	
171 GODDARD AVENUE				
BROOKLINE, MA 02445		<u> </u>		5,100
BRIGHAM AND WOMEN'S HOSPITAL	NONE	PUBLIC CHARITY	UNRESTRICTED	
75 FRANCIS STREET				5 000
BOSTON, MA 02215				5,000
FROM THE TOP	NONE	PUBLIC CHARITY	INDECADICADO	
295 HUNTINGTON AVENUE, SUITE 201	HONE	TOBBIC CHARTII	ORRESTRICIED	
BOSTON, MA 02115				_5,000.
MARCH OF DIMES	NONE	PUBLIC CHARITY	UNRESTRICTED	
45 WOODLAND ROAD				
CHESTNUT HILL, MA 02467				500.
MAIN COCTURED FOUNDAMION	NONE	DUDI TO GUADITHY	THE TAKEN OF THE PROPERTY OF T	
THE COGITARE FOUNDATION 9 WACCABUC RIVER LANE	NONE	PUBLIC CHARITY	TUJATANE SCHOOL	
SOUTH SALEM, NY 10590				3,000
BHS FRIENDS OF PERFORMING ARTS	NONE	PUBLIC CHARITY	PERFORMING ARTS WISH	
762 WASHINGTON STREET			LIST DONATION	
BROOKLINE, MA 02446				500.
COMMON IMPACT	NONE	PUBLIC CHARITY	TIME DOWN TOWN	
215 FIRST STREET, SUITE 25	NONE	FORLIC CHARITY	DIRESTRICTED	
CAMBRIDGE, MA 02142				2,500.
GARDNER MUSEUM	NONE	PUBLIC CHARITY	UNRESTRICTED	
280 THE FENWAY BOSTON MA 02115				2,500.
Total from continuation sheets				703,100

ANNE AND PAUL MARCUS FAMILY FOUNDATION 01-6220476

3 Grants and Contributions Paid During the Ye	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	CONTINUENT	
BROOKLINE HIGH SCHOOL	NONE	GOVERNMENTAL	21ST CENTURY FUND	
115 GREENOUGH STREET		UNIT	i	
BROOKLINE, MA 02445	<u> </u>			15,00
HARVARD UNIVERSITY	NONE	PUBLIC CHARITY	STEVE HYMAN FELLOWSHIP	
1350 MASSACHUSETTS AVENUE			FUND	
CAMBRIDGE, MA 02138				25,00
MASSACHUSETTS INSTITUTE OF TECHNOLOGY	NONE	PUBLIC CHARITY	MARCUS FELLOWSHIP FUND	
77 MASSACHUSETTS AVENUE			- NORMAN LEVANTHAN FOR	
CAMBRIDGE, MA 02139			2011 AND 2012	400,00
BOSTON COLLEGE	NONE	PUBLIC CHARITY	INTERNATIONAL MIND,	
140 COMMONWEALTH AVENUE			BRAIN & SOCIETY	
CHESTNUT HILL, MA 02467				1,00
PAN MASS CHALLANGE	NONE	PUBLIC CHARITY	UNRESTRICTED	
77 FOURTH AVENUE]			
NEEDHAM, MA 02494				16,50
PARK SCHOOL	NONE	PUBLIC CHARITY	STRATEGIC PLAN	
171 GODDARD AVENUE				
BROOKLINE, MA 02445				125,00
ASPERGER'S ASSOCIATION OF NEW ENGLAND	NONE	PUBLIC CHARITY	UNRESTRICTED	
85 MAIN STREET WATERTOWN, MA 02472				50
TOWN OF BROOKLINE	NONE	GOVERNMENTAL	BROOKLINE HIGH SCHOOL	
115 GREENOUGH STREET BROOKLINE, MA 02445		UNIT	LEARNING CENTERS	20.00
BROOKBINE, MA 02443				32,00
BRIDGE BOSTON FOUNDATION	NONE	PUBLIC CHARITY	UNRESTRICTED	
75 PARK PLAZA BOSTON, MA 02116				25 24
SOUTON, FIR VALLU				25,00
MCGOVERN INSTITUTE	NONE	PUBLIC CHARITY	UNRESTRICTED	
43 VASSAR STREET CAMBRIDGE, MA 02139				1 5/
Total from continuation sheets	<u> </u>	1	<u> </u>	1,5

ANNE AND PAUL MARCUS FAMILY FOUNDATION 01-6220476

3 Grants and Contributions Paid During the	Year (Continuation)		-	
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Hame and address (nome or business)	or substantial contributor	recipient		
COMON TWD CO	MONE	PUBLIC CHARITY	INID DOMD I CMPD	
COMMON IMPACT 215 FIRST STREET, SUITE 25	NONE	PUBLIC CHARITY	UNKESTRICTED	
CAMBRIDGE, MA 02142				25,000
CHADRIDON, IN VALVA				25,000
				•
		+		
			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
<u> </u>				
		 		
		}		
			<u> </u>	 -
Total from continuation sheets				1

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelated	business income	Exclud	ded by section 512, 513, or 514	(e)
the gross amounts amoss otherwise maloated.	(a) Business	(b)	(c) Exclu-	(d)	Related or exempt
1 Program service revenue:	code	Amount	code	Amount	function income
a					
b					
C					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments				•	
3 Interest on savings and temporary cash					
investments		·	14	119.	
4 Dividends and interest from securities			14	23,966.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property	1				
b Not debt-financed property	 		\vdash		
6 Net rental income or (loss) from personal					
property					
7 Other investment income	 				
8 Gain or (loss) from sales of assets other	1		18	05 620	
than inventory	-		10	-85,639.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory 11 Other revenue:					
a		· · · · · · · · · · · · · · · · · · ·			
b					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		-61,554.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	-61,554.
(See worksheet in line 13 instructions to verify calculations.)		_			
Part XVI-B Relationship of Activities t	o the Accor	nplishment of Ex	emp	t Purposes	
Line No. Explain below how each activity for which inco	me is reported in	column (e) of Part XVI-A	contrib	uted importantly to the accomp	ulishment of
the foundation's exempt purposes (other than					
		×			
			•		

		/					 -		
	and be		t, and complete Declara	mined this return, including tion of preparer (other than		on of which	has any knowledge	May the IRS discuss return with the prepa shown below (see in:	rer
Paid		Print/Type prep EDWARD		Preparer's effo	nature	ate	Check if self- employed	PTIN P00075888	3
Prepai Use O	nly			CPARDINA CPA			Firm's EIN ► 0	04-3099172	
		Firm's address	► 33 BROAL BOSTON,	MA 02109	TH FL		 Phone no. 6	517-720-552	

	(a) List and 2-story b	d describe the kind(s) of property sol rick warehouse; or common stock, 2	d, e.g., real estate, 00 shs. MLC Co.	(b)	How acquired - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a POWERSHAR	ES DB	AGRI 1256 S/T P	ORTION		P		
b POWERSHAR			ORTION		P		
c POWERSHAR		OIL FUND 1256 S			P		
d POWERSHAR			/T PORTION		P		
e POWERSHAR		AGRICULTURE FUN			P		08/09/11
f POWERSHAR					P		09/27/11
g FIDELITY					P		
		TMENTS L/T TRANS			P		
CAPITAL G							
k					· · · · · · · · · · · · · · · · · · ·		
m							
n							
0							
(e) Gross sales pr	rice	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale			Gain or (loss) lus (f) minus (g)	
a			3,088.				-3,088.
b			4,633.				<u>-4,633.</u>
С			173.			_	<u>-173.</u>
<u>d</u>			259.				-259.
	<u>,729.</u>		46,645.				84.
	,222.		15,645.				-2,423.
g 1,437			1,519,228.				<u>-81,361.</u>
<u>h 354</u>	<u>,579.</u>		348,669.				5,910.
1	304.						304.
1							
<u>k</u>							
<u> </u>							
<u>m</u>							
<u>n</u>							
Complete only for as	sets show	ng gain in column (h) and owned by	the foundation on 12/31/69		(I) L os	ses (from col (h))	
Complete only for act	0000 0110111	(j) Adjusted basis	(k) Excess of col. (i)	(of col. (h) gain over	
(i) F.M.V. as of 12/3	31/69	as of 12/31/69	over col. (j), if any		but n	ot less than "-0-")	
a				**			-3,088.
b							-4,633.
C				**			-173.
d							-259.
е	•			**			84.
f				**			-2,423.
g				**			-81,361.
h							<u>5,910.</u>
<u> </u>							304.
<u></u>					 		
<u>k</u>							
<u> </u>						.	
m							
<u>n</u>							
0		<u> </u>					
a Onestel accordate	/ +	apıtal loss) { If gaın, also enter if (loss), enter "-0	ın Part I, line 7				05 630
2 Capital gain net incom			, I	2	-	**	<u>-85,639.</u>
		ss) as defined in sections 1222(5) an	d (6):				
If gain, also enter in Pa If (loss), enter "-0-" in			ĵ	3			-86,961.
(.000), 01,001 0 111	- 41 - 19 11110	<u> </u>					

FORM 990-PF INTEREST ON SAVI	NGS AND	TEM	PORARY CA	ASH II	NVESTMENTS	STATEMENT	1
SOURCE						AMOUNT	
FIDELITY INVESTMENTS POWERSHARES DB AGRCULTURE FUN POWERSHARES DB OIL FUND	ID						77. 40. 2.
TOTAL TO FORM 990-PF, PART I,	LINE 3,	COI	LUMN A			1	19.
FORM 990-PF DIVIDEND	S AND IN	ITERI	EST FROM	SECUI	RITIES	STATEMENT	2
SOURCE	GR	oss	AMOUNT		ITAL GAINS IVIDENDS	COLUMN (A	.)
NATIONAL FINANCIAL SERVICES			24,270.		304.	23,9	66.
TOTAL TO FM 990-PF, PART I, I	N 4		24,270.		304.	23,9	66.
FORM 990-PF	ACCOU	NTI	NG FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSE PER BOO		(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
ACCOUNTING	3,4	452. 1,00		,000.	1,00	0. 2,4	52.
TO FORM 990-PF, PG 1, LN 16B	3,4	52.	1,	,000.	1,00	0. 2,4	52.
FORM 990-PF C	THER PRO	FESS	SIONAL FE	EES		STATEMENT	4
DESCRIPTION	(A) EXPENSE PER BOO		(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
CONSULTANTS	138,5	53.		0.		0. 138,5	53.
	138,5						

FORM 990-PF	OTHER E	XPENSES		STATEMENT !	
DESCRIPTION	(A) (B) EXPENSES NET INV PER BOOKS MENT IN				
OFFICE EXPENSE STATE FILING FEES INVESTMENT EXPENSES	135. 500. 915.		0. 0. 15. 92	0. 135 0. 500 5. 0	
TO FORM 990-PF, PG 1, LN 23	1,550.	91	9:	15. 635.	
FORM 990-PF	CORPORAT	E STOCK		STATEMENT (
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE	
FIDELITY INVESTMENTS			184,682.	176,164.	
TOTAL TO FORM 990-PF, PART II	, LINE 10B	<u> </u>	184,682.	176,164.	
FORM 990-PF	OTHER INV	ESTMENTS		STATEMENT 7	
DESCRIPTION		LUATION ETHOD	BOOK VALUE	FAIR MARKET VALUE	
POWERSHARES DB AGRCULTURE FUN	1D	COST	43,210.	42,511.	
TOTAL TO FORM 990-PF, PART II	, LINE 13		43,210.	42,511.	
FORM 990-PF	PART XV - L OF FOUNDATI			STATEMENT 8	

NAME OF MANAGER

ANNE P MARCUS
PAUL R MARCUS

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

PAUL MARCUS 260 FRANKLIN STREET BOSTON, MA 02110

TELEPHONE NUMBER NAME OF GRANT PROGRAM

617 556-5200

NONE

FORM AND CONTENT OF APPLICATIONS

LETTER OUTLINING NEED AND USE OF FUNDS

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION FAVORS PROGRAMS BENEFITING CHILDREN

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ANNE MARCUS 260 FRANKLIN STREET BOSTON, MA 02110

TELEPHONE NUMBER NAME OF GRANT PROGRAM

617 556-5200

NONE

FORM AND CONTENT OF APPLICATIONS

LETTER OUTLINING NEED AND USE OF FUNDS

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION FAVORS PROGRAMS BENEFITING CHILDREN

Form 8868 (R	Rev. 1-2012)					Page 2
• If you are fi	iling for an Additional (Not Automatic) 3-Month Ex	tension, o	complete only Part II and check this	s box		▶ [X]
	omplete Part II if you have already been granted an a				8868.	, <u> </u>
	iling for an Automatic 3-Month Extension, comple					
Part II	Additional (Not Automatic) 3-Month E			nal (no c	opies nee	ded).
				<u>`</u>		see instructions
Type or N	lame of exempt organization or other filer, see instru	ctions	Litter mer 3			
print	arise of exempt organization of other mer, see instru	Lilipioye	Employer identification number (EIN) or			
	NE AND PAUL MARCUS FAMILY	\mathbf{x}	01-62	20176		
	lumber, street, and room or suite no If a P.O box, s					
titing your 1	50 FRANKLIN STREET, NO. 6T	Social se	curity numb	er (55IV)		
		!!				
1 4	City, town or post office, state, and ZIP code. For a for	oreign add	ress, see instructions			
	OSTON, MA 02110					
Enter the Reti	urn code for the return that this application is for (file	e a separa	te application for each return)	•		. [0]4]
		1				
Application		Return	Application			Return
ls For		Code	Is For			Code
Form 990		01				
Form 990-BL		02	Form 1041-A			08
Form 990-EZ		01	Form 4720			09
Form 990-PF		04	Form 5227			10
Form 990-T (s	sec. 401(a) or 408(a) trust)	05	Form 6069			11
Form 990-T (ti	rust other than above)	06	Form 8870			12
STOP! Do no	t complete Part II if you were not already granted	an auton	natic 3-month extension on a prev	iously file	ed Form 886	3
	THE CORPORATION	V				
• The books	are in the care of > 260 FRANKLIN ST	<u> </u>	, NO. 6TH FL - BOS'	TON,	MA 021	10
Telephone	No. ► 617 556 5200		FAX No 🕨			
• If the organ	nization does not have an office or place of business	s in the Ur	ited States, check this box			
• If this is for	r a Group Return, enter the organization's four digit	Group Exe	emption Number (GEN) . It	f this is fo	r the whole g	roup, check this
box 🕨 🔲	If it is for part of the group, check this box		ch a list with the names and EINs of		_	
4 I reques	st an additional 3-month extension of time until		BER 15, 2012.		·	
5 For cale	endar year 2011 , or other tax year beginning		, and ending	9		
	x year entered in line 5 is for less than 12 months, c	heck reas		Final r	eturn	
□с	hange in accounting period					
7 State in	detail why you need the extension					
AWAI	TING INFORMATION FROM THIE	RD PAI	RTIES WHICH IS NEED	DED T	O PREP	ARE A
	LETE AND ACCURATE RETURN.					
8a If this a	pplication is for Form 990-BL, 990-PF, 990-T, 4720, 6	or 6069. e	nter the tentative tax, less any			
	indable credits See instructions.		,	8a	\$	4,788.
	pplication is for Form 990-PF, 990-T, 4720, or 6069,	enter anv	refundable credits and estimated			277001
•	ments made Include any prior year overpayment all	•				
	usly with Form 8868	01104 40 0	and any amount paid	8b	\$	4,788.
	e due. Subtract line 8b from line 8a Include your pa	vment wit	h this form if required by using	00	Ψ	±,700.
	(Electronic Federal Tax Payment System) See instru	•	in this form, in required, by using	8c	\$	0.
			t be completed for Part II o		<u> </u>	
Under nenalties	of perjury, I declare that I have examined this form, includ		•	•	f my knowlede	a and halief
it is true, correc	ct, and complete, and that I mave examined this form, includent, and complete, and that I am authorized to prepare this fo	ing accomp irm.	anying someodies and statements, and to	. 1116 DE21 0	i my knowiedg	c and belief,
Signature >	Tıtle ▶			Data		
Olymatule	ille 🚩			Date		

Form 8868 (Rev. 1-2012)