Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2011

Open to Public Inspection

A For the 2011 calendar year, or tax year beginning 2/1/2011 , and ending 1/31/2012

B Check if applicable
- [ ] Address change
- [ ] Name change
- [ ] Initial return
- [ ] Terminated
- [ ] Amended return
- [ ] Application pending

C Name of organization: SUSAN H. & WILBUR H MARCY TRUST
Doing Business As
Number and street (or P O box if mail is not delivered to street address): P O. BOX 1328 | Room/suite
City or town, state or country, and ZIP + 4: WINTER PARK FL 32790

D Employer identification number: 59-1932547
E Telephone number: (407) 644-9801
G Gross receipts $ 485,546

F Name and address of principal officer: Kenneth F Murrah P O. Box 1328, Winter Park, FL 32790

H(a) Is this a group return for affiliates? [ ] Yes [X] No
H(b) Are all affiliates included? [ ] Yes [ ] No
If "No," attach a list (see instructions)
H(c) Group exemption number ▶

I Tax-exempt status [X] 501(c)(3) [ ] 501(c) ( ) ◀ (insert no) [ ] 4947(a)(1) or [ ] 527

J Website: ▶ N/A

K Form of organization [ ] Corporation [X] Trust [ ] Association [ ] Other ▶
L Year of formation 1979
M State of legal domicile FL

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities: The Trust is a supporting organization for the United Methodist Church and churches and other institutions affiliated with it in the Southeastern U.S The Trust used its net income in the current year to make grants to the 1st United Meth Church of Winter Park, Emory Univ., the Fla Conf of the United Meth Ch

2 Check this box ▶ [ ] if the organization discontinued its operations or disposed of more than 25% of its net assets

3	Number of voting members of the governing body (Part VI, line 1a)	3	3
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	1
5	Total number of individuals employed in calendar year 2011 (Part V, line 2a)	5	0
6	Total number of volunteers (estimate if necessary)	6	0
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0
b	Net unrelated business taxable income from Form 990-T, line 34	7b	0

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	0	0
	9	Program service revenue (Part VIII, line 2g)	0	0
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	453,024	31,529
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0	0
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	453,024	31,529
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	147,675	172,192
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	104,387	122,220
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 0		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	12,306	2,529
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	264,368	296,941
	19	Revenue less expenses Subtract line 18 from line 12	188,656	-265,412
			Beginning of Current Year	**End of Year**
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	10,669,816	10,691,628
	21	Total liabilities (Part X, line 26)	2,435	31,945
	22	Net assets or fund balances. Subtract line 21 from line 20	10,667,381	10,659,683

JUN 2 0 2012
OGDEN, UT

SCANNED JUL 10 2012

Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge

Sign Here
Kenneth F. Murrah — Signature of officer — June 12, 2012 — Date
Kenneth F Murrah Co-Trustee
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check [ ] if self-employed	PTIN
Bruce M Wigle, III	B M Wigle	6-11-12		P00285634

Firm's name ▶ Murrah, Doyle and Wigle, P A — Firm's EIN ▶ 59-1563049
Firm's address ▶ 800 W Morse Blvd , Suite 1, Winter Park, FL 32789 — Phone no (407) 644-9801

May the IRS discuss this return with the preparer shown above? (see instructions) [X] Yes [ ] No

Part III **Statement of Program Service Accomplishments**

Check if Schedule O contains a response to any question in this Part III . . . . ☐

1 Briefly describe the organization's mission

The Trust is a supporting organization for the United Methodist Chuch and churches and other institutions affilitated with it in the Southeastern states of the U S.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . ☐ **Yes** ☒ **No**

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . ☐ **Yes** ☒ **No**

If "Yes," describe these changes on Schedule O

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code) (Expenses $ 40,517 including grants of $ 40,517) (Revenue $ 0)

Grant to Emory University, Atlanta, Georgia, in the amount of $19,900 00 for the 2012-2013 Susan H Marcy Scholarship at the Candler School of Theology; and grant to Emory University, Atlanta, Georgia, in the amount of $20,616 65 for the 2012-2013 Susan H Marcy Fellows Program for ministers of the Florida Annual Conference of the United Methodist Church

4b (Code.) (Expenses $ 111,675 including grants of $ 111,675) (Revenue $ 0)

Grant to the First United Methodist Church of Winter Park, Florida, in the amount of $75,000 00 for the 2012 Operating Budget Challenge Matching Grant; and grant to the First United Methodist Church of Winter Park, Florida, in the amount of $36,675.00 for the 2012 Marcy Music Scholarships

4c (Code:) (Expenses $ 20,000 including grants of $ 20,000) (Revenue $ 0)

Grant to The Florida United Methodist Foundation, Inc., as a Matching Grant to the Together Campaign for Kids and Camps of the Florida Annual Conference of the United Methodist Church

4d Other program services (Describe in Schedule O.)

(Expenses $ 0 including grants of $ 0) (Revenue $ 0)

4e **Total program service expenses** ► 172,192

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	X	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2		X
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		X
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		X
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III* N/A	5		
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		X
9	Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		X
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI.*	11a		X
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII.*	11b		X
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII.*	11c		X
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX.*	11d		X
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e		X
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f		X
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI, XII, and XIII*	12a		X
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional*	12b		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		X
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or assistance to any organization or entity located outside the United States? *If "Yes," complete Schedule F, Parts II and IV*	15		X
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or assistance to individuals located outside the United States? *If "Yes," complete Schedule F, Parts III and IV*	16		X
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I (see instructions).*	17		X
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		X
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		X
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? N/A	20b		

Part IV Checklist of Required Schedules *(continued)*

			Yes	No
21	Did the organization report more than $5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21	X	
22	Did the organization report more than $5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	23		X
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K If "No," go to line 25*	24a		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? N/A	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? N/A	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? N/A	24d		
25a	**Section 501(c)(3) and 501(c)(4) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L, Part I*	25b		X
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? *If "Yes," complete Schedule L, Part II*	26		X
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part III*	27		X
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28a		X
b	A family member of a current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28b		X
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? *If "Yes," complete Schedule L, Part IV*	28c		X
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29		X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? *If "Yes," complete Schedule R, Part I*	33		X
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1*	34	X	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		X
b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b		X
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	37		X
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? **Note.** All Form 990 filers are required to complete Schedule O.	38	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response to any question in this Part V . . . . ☐

				Line	Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable .	1a	0			
b	Enter the number of Forms W-2G included in line 1a Enter -0- if not applicable .	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . N/A			1c		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	0			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? N/A **Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to *e-file* (see instructions)			2b		
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?			3a		X
b	If "Yes," has it filed a Form 990-T for this year? *If "No," provide an explanation in Schedule O* N/A			3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			4a		X
b	If "Yes," enter the name of the foreign country: ▶ See instructions for filing requirements for Form TD F 90-22 1, Report of Foreign Bank and Financial Accounts					
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			5a		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? .			5b		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T? . . . . . N/A			5c		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible?			6a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . N/A			6b		
7	**Organizations that may receive deductible contributions under section 170(c).**					
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?			7a		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided? N/A			7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c		X
d	If "Yes," indicate the number of Forms 8282 filed during the year . . . . . N/A	7d				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? .			7e		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . .			7f		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as requireN/A			7g		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 10'N/A			7h		
8	**Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.** Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?			8		X
9	**Sponsoring organizations maintaining donor advised funds.**					
a	Did the organization make any taxable distributions under section 4966?			9a		X
b	Did the organization make a distribution to a donor, donor advisor, or related person?			9b		X
10	**Section 501(c)(7) organizations.** Enter:					
a	Initiation fees and capital contributions included on Part VIII, line 12 . . . . N/A	10a				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities N/A	10b				
11	**Section 501(c)(12) organizations.** Enter					
a	Gross income from members or shareholders . . . . N/A	11a				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) . . . . N/A	11b				
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?N/A			12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year . N/A	12b				
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**					
a	Is the organization licensed to issue qualified health plans in more than one state? . . . . N/A **Note.** See the instructions for additional information the organization must report on Schedule O			13a		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . .N/A	13b				
c	Enter the amount of reserves on hand . . . . .N/A	13c				
14a	Did the organization receive any payments for indoor tanning services during the tax year?			14a		X
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O* . N/A			14b		

Part VI **Governance, Management, and Disclosure** *For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.*

Check if Schedule O contains a response to any question in this Part VI . . . [X]

Section A. Governing Body and Management

		Line	Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year . . . 1a 3 If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.			
b	Enter the number of voting members included in line 1a, above, who are independent . . 1b 1			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?	3		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6	Did the organization have members or stockholders?	6		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a	The governing body?	8a	X	
b	Each committee with authority to act on behalf of the governing body? N/A	8b		
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*	9	X	

Section B. Policies *(This Section B requests information about policies not required by the Internal Revenue Code.)*

		Line	Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a		X
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? N/A	10b		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a		X
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conf N/A	12b		
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this was done* N/A	12c		
13	Did the organization have a written whistleblower policy?	13		X
14	Did the organization have a written document retention and destruction policy?	14		X
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a		X
b	Other officers or key employees of the organization If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).	15b		X
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		X
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? N/A	16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

[ ] Own website [ ] Another's website [X] Upon request

19 Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization. ▶ Kenneth F. Murrah (407) 644-9801
800 W Morse Blvd , Suite 1, Winter Park, FL 32789-3735

Part VII **Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response to any question in this Part VII . . . . . . ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees, highest compensated employees, and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee): Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
(1) Kenneth F Murrah Trustee		X						122,220	0	0
(2) Gregory Zechman Trustee		X						0	0	0
(3) Milton E. Wilson Trustee		X						0	0	0
(4)										
(5)										
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees *(continued)*

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position: Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
(15)										
(16)										
(17)										
(18)										
(19)										
(20)										
(21)										
(22)										
(23)										
(24)										
(25)										
1b Sub-total ▶								122,220	0	0
c Total from continuation sheets to Part VII, Section A ▶								0	0	0
d Total (add lines 1b and 1c) ▶								122,220	0	0

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 1

		Yes	No
3 Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	3		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	4		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	5		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation
		0
		0
		0
		0
		0

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 0

Part VIII Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a	0				
	b Membership dues	1b	0				
	c Fundraising events	1c	0				
	d Related organizations	1d	0				
	e Government grants (contributions)	1e	0				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	0				
	g Noncash contributions included in lines 1a-1f:	$	0				
	h Total. Add lines 1a–1f ▶			0			
Program Service Revenue		Business Code					
	2a			0			
	b			0			
	c			0			
	d			0			
	e			0			
	f All other program service revenue			0			
	g Total. Add lines 2a–2f ▶			0			
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts) . (including capital gain distributions) ▶			336,025			336,025
	4 Income from investment of tax-exempt bond proceeds ▶			0			
	5 Royalties ▶			0			
		(i) Real	(ii) Personal				
	6a Gross rents						
	b Less: rental expenses						
	c Rental income or (loss)	0	0				
	d Net rental income or (loss) ▶			0			
	7a Gross amount from sales of assets other than inventory	(i) Securities 34,952	(ii) Other 114,569				
	b Less: cost or other basis and sales expenses	37,692	416,325				
	c Gain or (loss)	-2,740	-301,756				
	d Net gain or (loss) ▶			-304,496			-304,496
	8a Gross income from fundraising events (not including $ 0 of contributions reported on line 1c). See Part IV, line 18	a	0				
	b Less: direct expenses	b	0				
	c Net income or (loss) from fundraising events ▶			0			
	9a Gross income from gaming activities See Part IV, line 19	a	0				
	b Less. direct expenses	b	0				
	c Net income or (loss) from gaming activities ▶			0			
	10a Gross sales of inventory, less returns and allowances	a	0				
	b Less. cost of goods sold	b	0				
	c Net income or (loss) from sales of inventory ▶			0			
	Miscellaneous Revenue	Business Code					
	11a			0			
	b			0			
	c			0			
	d All other revenue			0			
	e Total. Add lines 11a–11d ▶			0			
	12 Total revenue. See instructions ▶			31,529	0	0	31,529

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D)

Check if Schedule O contains a response to any question in this Part IX . . . ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21	172,192	172,192		
2 Grants and other assistance to individuals in the United States See Part IV, line 22	0			
3 Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16 .	0			
4 Benefits paid to or for members .	0			
5 Compensation of current officers, directors, trustees, and key employees .	122,220		122,220	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0			
7 Other salaries and wages . .	0			
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	0			
9 Other employee benefits . . .	0			
10 Payroll taxes	0			
11 Fees for services (non-employees):				
a Management .	0			
b Legal . .	0			
c Accounting .	0			
d Lobbying .	0			
e Professional fundraising services See Part IV, line 17	0			
f Investment management fees	0			
g Other	0			
12 Advertising and promotion .	0			
13 Office expenses .	16		16	
14 Information technology	0			
15 Royalties .	0			
16 Occupancy .	0			
17 Travel	0			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0			
19 Conferences, conventions, and meetings	0			
20 Interest	0			
21 Payments to affiliates . .	0			
22 Depreciation, depletion, and amortization	0	0	0	0
23 Insurance	0			
24 Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
a Bruce Wigle, tax preparation	1,950		1,950	
b Misc expenses related to mortgage foreclosure	563		563	
c	0			
d	0			
e All other expenses	0			
25 **Total functional expenses.** Add lines 1 through 24e .	296,941	172,192	124,749	0
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720) .				

Part X Balance Sheet

			(Fair Market Value) (A) Beginning of year		(Fair Market Value) (B) End of year
Assets	1	Cash—non-interest-bearing		1	
	2	Savings and temporary cash investments	904,039	2	821,028
	3	Pledges and grants receivable, net	0	3	0
	4	Accounts receivable, net	0	4	0
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions)		6	
	7	Notes and loans receivable, net	726,525	7	279,080
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges		9	
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D — 10a: 0			
	b	Less accumulated depreciation — 10b: 0	0	10c	0
	11	Investments—publicly traded securities	9,039,252	11	9,591,520
	12	Investments—other securities See Part IV, line 11	0	12	0
	13	Investments—program-related. See Part IV, line 11	0	13	0
	14	Intangible assets	0	14	0
	15	Other assets See Part IV, line 11	0	15	0
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)	10,669,816	16	10,691,628
Liabilities	17	Accounts payable and accrued expenses		17	
	18	Grants payable	2,435	18	31,945
	19	Deferred revenue		19	
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D		21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties	0	23	0
	24	Unsecured notes and loans payable to unrelated third parties	0	24	0
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	0	25	0
	26	**Total liabilities.** Add lines 17 through 25	2,435	26	31,945
Net Assets or Fund Balances		**Organizations that follow SFAS 117, check here ▶ ☐ and complete lines 27 through 29, and lines 33 and 34.**			
	27	Unrestricted net assets		27	
	28	Temporarily restricted net assets		28	
	29	Permanently restricted net assets		29	
		Organizations that do not follow SFAS 117, check here ▶ ☒ and complete lines 30 through 34.			
	30	Capital stock or trust principal, or current funds	10,667,381	30	10,659,683
	31	Paid-in or capital surplus, or land, building, or equipment fund		31	
	32	Retained earnings, endowment, accumulated income, or other funds		32	
	33	Total net assets or fund balances	10,667,381	33	10,659,683
	34	Total liabilities and net assets/fund balances	10,669,816	34	10,691,628

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI . . . . . [X]

1	Total revenue (must equal Part VIII, column (A), line 12)	1	31,529
2	Total expenses (must equal Part IX, column (A), line 25)	2	296,941
3	Revenue less expenses Subtract line 2 from line 1	3	-265,412
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	10,667,381
5	Other changes in net assets or fund balances (explain in Schedule O)	5	257,714
6	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	10,659,683

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII . . . . . [ ]

			Yes	No
1	Accounting method used to prepare the Form 990: [X] Cash [ ] Accrual [ ] Other ____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		X
b	Were the organization's financial statements audited by an independent accountant?	2b		X
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? N/A	2c		
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
d	If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a separate basis, consolidated basis, or both: [ ] Separate basis [ ] Consolidated basis [ ] Both consolidated and separate basis N/A			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		X
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits N/A	3b		

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
SUSAN H. & WILBUR H MARCY TRUST

Employer identification number
59-1932547

Part I **Reason for Public Charity Status** (All organizations must complete this part) See instructions.

The organization is not a private foundation because it is· (For lines 1 through 11, check only one box)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state·

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II)

9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

10 ☐ An organization organized and operated exclusively to test for public safety See **section 509(a)(4).**

11 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a ☒ Type I   b ☐ Type II   c ☐ Type III–Functionally integrated   d ☐ Type III–Other

e ☒ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box . . . ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

		Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?	11g(i)		X
(ii) A family member of a person described in (i) above?	11g(ii)		X
(iii) A 35% controlled entity of a person described in (i) or (ii) above?	11g(iii)		X

h Provide the following information about the supported organization(s)

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document? Yes	No	(v) Did you notify the organization in col (i) of your support? Yes	No	(vi) Is the organization in col (i) organized in the U S? Yes	No	(vii) Amount of support
(A) Emory University	58-0566256	2	See Part IV	X	X		X		40,517
(B) First United Meth Chur	59-0674257	1	X		X		X		111,675
(C) Fla United Meth Found	59-1148710	1	X		X		X		20,000
(D)									0
(E)									0
Total 3									172,192

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III) N/A

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						0
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0
3 The value of services or facilities furnished by a governmental unit to the organization without charge						0
4 **Total.** Add lines 1 through 3	0	0	0	0	0	0
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public support.** Subtract line 5 from line 4						0

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
7 Amounts from line 4	0	0	0	0	0	0
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						0
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						0
11 **Total support.** Add lines 7 through 10						0

12 Gross receipts from related activities, etc. (see instructions) . . . 12

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2011 (line 6, column (f) divided by line 11, column (f)) . . . 14 0.00%

15 Public support percentage from 2010 Schedule A, Part II, line 14 . . . 15 0.00%

16a **33 1/3% support test—2011.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . ▶ ☐

b **33 1/3% support test—2010.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . ▶ ☐

17a **10%-facts-and-circumstances test—2011.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization. . . ▶ ☐

b **10%-facts-and-circumstances test—2010.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization . . . ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . ▶ ☐

Part III **Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II) N/A

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")						0
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						0
3 Gross receipts from activities that are not an unrelated trade or business under section 513						0
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .						0
5 The value of services or facilities furnished by a governmental unit to the organization without charge						0
6 **Total.** Add lines 1 through 5	0	0	0	0	0	0
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						0
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						0
c Add lines 7a and 7b	0	0	0	0	0	0
8 **Public support** (Subtract line 7c from line 6)						0

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
9 Amounts from line 6	0	0	0	0	0	0
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						0
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						0
c Add lines 10a and 10b	0	0	0	0	0	0
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						0
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						0
13 **Total support.** (Add lines 9, 10c, 11, and 12)	0	0	0	0	0	0

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2011 (line 8, column (f) divided by line 13, column (f))	15	0 00%
16 Public support percentage from 2010 Schedule A, Part III, line 15	16	0 00%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2011** (line 10c, column (f) divided by line 13, column (f))	17	0 00%
18 Investment income percentage from **2010** Schedule A, Part III, line 17	18	0 00%

19a **33 1/3% support tests—2011.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support tests—2010.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b, and Part III, line 12 Also complete this part for any additional information. (See instructions).

Part 1, Line 11h

Emory University, in Atlanta, GA, is not specifically listed by name as a beneficiary in the Trust document, but it is a permissable donee under the Trust document since it is a public charitable organization affiliated with the United Methodist Church in the Southeastern states of the United States

SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

Grants and Other Assistance to Organizations, Governments, and Individuals in the United States

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990.

OMB No 1545-0047
2011
Open to Public Inspection

Name of the organization: SUSAN H & WILBUR H. MARCY TRUST
Employer identification number: 59-1932547

Part I **General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . [X] Yes [ ] No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II **Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than $5,000 Check this box if no one recipient received more than $5,000. Part II can be duplicated if additional space is needed . . . ▶ [ ]

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) Emory University 201 Dowman Dr Atlanta, GA 3032	58-0566256	501(c)(3)	40,517	0			See 990, page 2
(2)			0	0			
(3) First United Methodist Church 125 N Interlachen Ave Winter Par	59-0674257	501(c)(3)	111,675	0			See 990, page 2
(4) FL 32789			0	0			
(5) Fla United Methodist Found 450 Martin Luther King Jr. Avenue	59-1148710	501(c)(3)	20,000	0			See 990, page 2
(6) Lakeland, FL 33815			0	0			
(7)			0	0			
(8)			0	0			
(9)			0	0			
(10)			0	0			
(11)			0	0			
(12)			0	0			

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . ▶

3 Enter total number of other organizations listed in the line 1 table . . . ▶ 6

Part III **Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22
Part III can be duplicated if additional space is needed

	(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1		0	0	0		
2		0	0	0		
3		0	0	0		
4		0	0	0		
5		0	0	0		
6		0	0	0		
7		0	0	0		

Part IV **Supplemental Information.** Complete this part to provide the information required in Part I, line 2, and any other additional information

Written confirmation is received from the recipients.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047
2011
Open to Public Inspection

Name of the organization	Employer identification number
SUSAN H & WILBUR H MARCY TRUST	59-1932547

Form 990 Part VI, Section A, Line 8a and 8b:

Since the Trust has a small number of trustees (3), formal meetings are not held, and consensus for actions is developed over the telephone or through correspondence, and then confirmed in writing by the Trustees. There are no committees

Form 990 Part VI, Section A, Line 9:

The Trust's address is the office of the trustee, Kenneth F. Murrah The addresses of the other two trustees are as follows:

Gregory Zechman, 1921 Old Colony Lane, Maitland, FL 32751

Milton E Wilson, P. O Box 3767, Lakeland, FL 33802

Form 990 Part VI, Section B, Line 11b:

Copies of the 2011 Form 990 and the 2011 Annual Accounting were furnished to the trustees two days (or more) before the Form 990 was filed

Form 990 Part VI, Section B, Line 15:

The method for determining the compensation of the trustee, Kenneth F. Murrah, is set forth in the terms of the Trust which is found in the probated Last Will and Testament of Susan H. Marcy. The other two trustees do not receive compensation.

Form 990 Part VI, Section C, Line 19:

The organization's governing documents and financial statements are available to the public at 800 W. Morse Blvd , Suite 1, Winter Park, FL 32789, upon request made to Kenneth F Murrah

Form 990 Part XI, Line 5:

The increase shown on Line 5 is due to the appreciation (net unrealized capital gain) in the value of the Trust's publicly traded securities, less realized capital losses for the year.

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047
2011
Open to Public Inspection

Name of the organization
SUSAN H & WILBUR H MARCY TRUST

Employer identification number
59-1932547

Part I **Identification of Disregarded Entities** (Complete if the organization answered "Yes" to Form 990, Part IV, line 33) N/A

(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1)			0	0	
(2)			0	0	
(3)			0	0	
(4)			0	0	
(5)			0	0	
(6)			0	0	

Part II **Identification of Related Tax-Exempt Organizations** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity? Yes	No
(1) Emory University 58-0566256 201 Dowman Dr , Atlanta, GA 30322	Educational	GA	501(c)(3)	2	N/A		X
(2) First United Methodist Church 59-0674257 125 N Interlachen Ave , Winter Park, FL 32789	Religious	FL	501(c)(3)	1	N/A		X
(3) Fla United Methodist Foundation 59-1148710 450 Martin Luther King Jr Ave , Lakeland, FL 33815	Religious	FL	501(c)(3)	1	N/A		X
(4)							
(5)							
(6)							
(7)							

Part III **Identification of Related Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.) N/A

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1)					0	0			0			%
(2)					0	0			0			%
(3)					0	0			0			%
(4)					0	0			0			%
(5)					0	0			0			%
(6)					0	0			0			%
(7)					0	0			0			%

Part IV **Identification of Related Organizations Taxable as a Corporation or Trust** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.) N/A

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership
(1)					0	0	%
(2)					0	0	%
(3)					0	0	%
(4)					0	0	%
(5)					0	0	%
(6)					0	0	%
(7)					0	0	%

Part V Transactions With Related Organizations (Complete if the organization answered "Yes" to Form 990, Part IV, line 34, 35, 35a, or 36.)

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule

		Line	Yes	No
1	During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II–IV?			
a	Receipt of (i) interest (ii) annuities (iii) royalties or (iv) rent from a controlled entity	1a		X
b	Gift, grant, or capital contribution to related organization(s)	1b	X	
c	Gift, grant, or capital contribution from related organization(s)	1c		X
d	Loans or loan guarantees to or for related organization(s)	1d		X
e	Loans or loan guarantees by related organization(s)	1e		X
f	Sale of assets to related organization(s)	1f		X
g	Purchase of assets from related organization(s)	1g		X
h	Exchange of assets with related organization (s)	1h		X
i	Lease of facilities, equipment, or other assets to related organization(s)	1i		X
j	Lease of facilities, equipment, or other assets from related organization(s)	1j		X
k	Performance of services or membership or fundraising solicitations for related organization(s)	1k		X
l	Performance of services or membership or fundraising solicitations by related organization(s)	1l		X
m	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1m		X
n	Sharing of paid employees with related organization(s)	1n		X
o	Reimbursement paid to related organization(s) for expenses	1o		X
p	Reimbursement paid by related organization(s) for expenses	1p		X
q	Other transfer of cash or property to related organization(s)	1q		X
r	Other transfer of cash or property from related organization(s)	1r		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of other organization	(b) Transaction type (a–r)	(c) Amount involved	(d) Method of determining amount involved
(1) Emory University (See Form 990, page 2)	b	40,517	Cash distribution
(2) First United Methodist Church (See Form 990, page 2)	b	111,675	Cash distribution
(3) Fla United Methodist Foundation (See Form 990, page 2)	b	20,000	Cash distribution
(4)		0	
(5)		0	
(6)		0	

Part VI **Unrelated Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" to Form 990, Part IV, line 37.) N/A

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under section 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1)						0	0			0			%
(2)						0	0			0			%
(3)						0	0			0			%
(4)						0	0			0			%
(5)						0	0			0			%
(6)						0	0			0			%
(7)						0	0			0			%
(8)						0	0			0			%
(9)						0	0			0			%
(10)						0	0			0			%
(11)						0	0			0			%
(12)						0	0			0			%
(13)						0	0			0			%
(14)						0	0			0			%
(15)						0	0			0			%
(16)						0	0			0			%

Form 990, Part VIII, Line 3, Investment Income:

Divdends (total from below)	285,280.90
Interest (total from below)	41,170.20
Capital Gain Distributions (total from below)	9,574.01
Total Investment Income:	336,025.11

Dividends:

Altria Group	2,054.00
American Funds - Fundamental Investors	6,592.65
AT&T	8,845.96
Beam, Inc. (fomerly Fortune Brands)	2,614.40
CBS Corporation Class B	184.45
CenterPoint Energy, Inc.	504.04
CenturyLink, Inc.	3,441.61
Chevron Corporation	24,399.22
Citigroup	8.28
Comcast Corporation	351.88
Consolidated Edison Company	1,641.60
Corn Products International, Inc.	1,283.04
Darden Restaurants Inc.	9,207.00
Delaware Corporate Bond Fund - A	2,081.79
Devon Energy Corporation	259.96
Dominion Resources, Inc.	5,910.00
Dow Chemical Company	743.40
DTE Energy Company	3,483.75
Duke Energy Corp.	2,485.00
E. I. duPont DeNemours & Compay	2,853.60
Eaton Vance Balanced Fund - A	661.19
Exxon Mobil Corporation	31,139.20
Fidelity Fund	940.97
Frontier Commuications Corp.	218.28
GATX Corporation	1,322.40
General Mills, Inc.	19,150.56
Honeywell International	5,381.36
J. M. Smucker Company	198.72
J. P. Morgan Chase & Co.	918.00
Kraft Foods, Inc., Cl A	1,042.84
Massachusetts Investors Trust - A	797.59
Morgan Stanley U. S. Govt. Securities Trust - B	405.57
National Retail Properties I	10,447.00
Newmont Mining Corporation	760.00
NextEra Energy, Inc.	4,400.00
Norfolk Southern Corporation	3,585.60
Occidental Petroleum Corp.	5,520.00
Philip Morris International Inc.	3,666.00

Pioneer Bond Fund, Class Y	2,602.76
PowerShares Preferred	12,426.29
Praxair, Incorporated	2,052.00
Proctor and Gamble Company	22,312.17
Progress Energy, Inc.	4,190.67
Qwest Communications Int'l Inc.	48.80
Southern Co.	2,808.75
SPDR S&P Bank ETF (formerly KBW Bank)	2,242.22
Spectra Energy Corporation	795.00
Suburban Propane Partners, LP	12,617.00
Teco Energy Inc.	2,550.00
Templeton Global Income Fund, Inc.	21,917.13
Travelers Companies, Inc.	248.04
United Technologies Corporation	4,893.76
Vanguard Wellington Fund	979.86
Ventas, Inc.	3,650.10
Verizon Communications	2,386.40
Viacom, Inc.	474.30
Virtus Tactical Allocation Fund - A	1,194.74
Vodafone Group Plc	1,062.29
Wells Fargo	238.56
Williams Companies, Inc.	20.15
Windstream Corporation	14,069.00
	285,280.90

Interest:

1st Commercial Bank of Florida CD	104.86
Bank of America Checking Account	3.54
Carol J. Roberts Mortgage	1,241.44
Cimmie L. Boyer, Jr., Clark St 2002	3,977.68
Estate of Priscilla Cindy Duke Mortgage	3,356.76
Florida United Methodist Foundation, Inc.	18,565.42
James and Ann Saurman, Osceola Mortgage	6,500.04
John H. Allen Mortgage	3,800 00
Morgan Stanley Brokerage Account	2.68
Warner Chapel Mortgage	3,617.78
	41,170.20

Capital Gain Distributions:

Delaware Corporate Bond Fund	1,034.52
Pioneer Bond Fund	281.78
Templeton Global Income	8,227.81
Ventas, Inc.	29.90
	9,574.01

GAINS AND LOSSES ON SALES OR OTHER DISPOSITIONS

SUSAN H AND WILBUR H. MARCY TRUST
For Period 02/01/2011 Through 01/31/2012

			Gain	Loss
03/10/2011	Sale of real property located at 754 W Comstock Ave., Winter Park, FL 32789 to the Warner Chapel Primitive Baptist Church, Inc., for the purchase price of $74,174, which was satisfied by delivery of a note and mortgage from the buyer in the amount of the purchase price			
	Net Proceeds	$ 74,174 00		
	Fiduciary Acquisition Value	228,978 93		
	Net Loss			$ 154,804.93
04/18/2011	CenturyLink, Inc., receipt of cash in lieu of fractional share received on merger of Qwest Communications into CenturyLink, Inc. 0.504 Units			
	Net Proceeds	$ 20.94		
	Fiduciary Acquisition Value	2.98		
	Net Gain		$ 17 96	
05/26/2011	Proceeds from sale of real property located at 517 S. Pennsylvania Ave , Winter Park FL 32789			
	Net Proceeds	$ 40,394 93		
	Fiduciary Acquisition Value	187,346 40		
	Net Loss			146,951.47
06/02/2011	Proceeds from sale of Morgan Stanley U S. Govt. Securities Trust - B 3,995 28 Units			
	Net Proceeds	$ 34,918 75		
	Fiduciary Acquisition Value	37,681.56		
	Net Loss			2,762.81
01/23/2012	WPX Energy, Inc., receipt of cash in lieu of fractional share received in spin-off of WPX Energy from the Williams Company 0.6667 Units			
	Net Proceeds	$ 11 78		
	Fiduciary Acquisition Value	6.71		
	Net Gain		5 07	

GAINS AND LOSSES ON SALES OR OTHER DISPOSITIONS

SUSAN H AND WILBUR H MARCY TRUST
For Period 02/01/2011 Through 01/31/2012

	Gain	Loss
Total Gains and Losses	23 03	304,519.21
Less Gain		23.03
Net Loss		$ 304,496 18

PRINCIPAL BALANCE ON HAND

SUSAN H AND WILBUR H. MARCY TRUST

As of 01/31/2012

	Current Value	Carrying Value
Checking Accounts		
Bank of America Checking Account	$54,358 05	$54,358.05
Brokerage Account Deposits		
Morgan Stanley Brokerage Account (Discover Bank)	0 22	0 22
Savings Accounts		
Florida United Methodist Foundation, Inc	766,669 51	766,669.51
Common Stocks		
ACCO Brands Corporation 808 Units	8,580 96	2,118.86
Alcatel-Lucent Corp. 217 Units	377 58	2,791 55
Altria Group 1,300 Units	36,920.00	5,893.87
AT&T, Inc. (New) (formerly SBC Comm) 5,143 Units	151,255.63	19,793.36
Beam, Inc (formerly Fortune Brands) 3,440 Units	179,946 40	25,898 04
CBS Corporation Class B 527 Units	15,008 96	1,780.52
CenterPoint Energy, Inc 638 Units	11,783 86	9,100.27
CenturyLink, Inc. 1,212 Units	44,880.36	7,167.83
Chevron Corporation 7,896.1856 Units	814,254 66	158,967.08
Citigroup, Inc. 276 Units	8,478 72	6,119 13
Comcast Corporation 782 Units	20,785 56	4,635.52
Consolidated Edison Company 684 Units	40,328 64	4,124.52
Corn Products International, Inc. 1,944 Units	107,872.56	3,808 03

PRINCIPAL BALANCE ON HAND
SUSAN H AND WILBUR H. MARCY TRUST
As of 01/31/2012

	Current Value	Carrying Value
Darden Restaurants, Inc 6,138 Units	$281,550 06	$ 4,089.40
Devon Energy Corporation 388 Units	24,758 28	8,698 07
Directv, Class A 246 Units	11,072.46	1,677 81
Dominion Resources, Inc (New) 3,000 Units	150,120.00	87,555.83
Dow Chemical Company 826 Units	27,679.26	2,795 68
DTE Energy Company 1,500 Units	79,815 00	51,350 46
Duke Energy Corp 5,500 Units	117,205 00	93,954 56
E I. duPont DeNemours & Company 1,740 Units	88,548 60	11,599 97
Exxon Mobil Corporation 16,832 Units	1,409,511 68	120,979 89
FairPoint Communications, Inc 21 Units	85 47	38 24
Fortune Brands Home & Security, Inc. 3,440 Units	63,880.80	7,201 37
Frontier Communications Corporation 291 Units	1,245 48	555 15
GATX Corporation 1,140 Units	48,951.60	23,583 29
General Mills, Inc 16,368 Units	651,937.44	19,480 60
General Motors Corporation 526 Units	12,634.52	10,487.90
GenOn Energy, Inc (formerly RRI Energy, formerly Reliant) 503 Units	1,071.39	1,752 46

PRINCIPAL BALANCE ON HAND
SUSAN H. AND WILBUR H. MARCY TRUST
As of 01/31/2012

	Current Value	Carrying Value
Honeywell International 3,928 Units	$ 227,981 12	$ 4,480.87
J M. Smucker Company 108 Units	8,508 24	198.95
J. P. Morgan Chase & Co. 918 Units	34,241 40	8,355 68
Kraft Foods, Inc., Cl A 899 Units	34,431.70	6,044 71
National Retail Properties I 9,600 Units	259,296 00	197,375 19
NCR Corporation 107.626 Units	2,015 83	283.86
Newmont Mining Corporation 760 Units	46,724 80	11,570.45
NextEra Energy, Inc. (formerly FPL Group) 2,000 Units	119,700 00	27,625 00
Norfolk Southern Corporation 2,160 Units	155,952 00	5,968 80
Occidental Petroleum Corp. 3,000 Units	299,310 00	23,103 20
Philip Morris International Inc 1,300 Units	97,201.00	13,430 32
PowerShares Preferred Financial Portfolio 17,950 Units	255,428 50	257,625.55
Praxair, Incorporated 1,026 Units	108,961 20	3,925.18
Proctor and Gamble Company 10,848 Units	683,857 92	24,780 12
Progress Energy, Inc 1,530 Units	83,124.90	35,483 12
Southern Co 1,500 Units	68,340 00	26,181.73

PRINCIPAL BALANCE ON HAND

SUSAN H AND WILBUR H MARCY TRUST
As of 01/31/2012

	Current Value	Carrying Value
SPDR S&P Bank ETF (formerly KBW Bank ETF) 6,000 Units	$ 126,660.00	$198,822.45
Spectra Energy Corporation 750 Units	23,617 50	10,868.01
Sprint Nextel Corporation 16,225 Units	34,397.00	45,872.08
Suburban Propane Partners, LP 3,700 Units	159,544.00	151,388 53
Teco Energy Inc 3,000 Units	54,150.00	52,937 65
Teradata Corporation 107.626 Units	5,764.45	312 11
Travelers Companies, Inc. (The) 156 Units	9,094.80	407.01
United Technologies Corporation 2,624 Units	205,590.40	6,724.00
Ventas, Inc. 1,600 Units	93,296.00	73,001 25
Verizon Communications 1,216 Units	45,794.56	8,423.10
Viacom, Inc. (New) Class B 527 Units	24,790 08	2,712 34
Vodafone Group Plc 752 Units	20,364.16	1,458 83
Wells Fargo & Co (fomerly Wachovia Corp.) 497 Units	14,517.37	83,269 54
Williams Companies, Inc. 26 Units	749 32	384 76
Windstream Corporation 14,069 Units	169,742.49	161,817.10
WPX Energy, Inc. 8 Units	131 84	80.51

PRINCIPAL BALANCE ON HAND

SUSAN H. AND WILBUR H MARCY TRUST
As of 01/31/2012

	Current Value	Carrying Value
Mutual Funds		
American Funds - Fundamental Investors 10,719.788 Units	$ 398,883 31	$191,383.80
Delaware Corporate Bond Fund - A 7,606.787 Units	45,488 59	51,503.23
Eaton Vance Balanced Fund - A 5,524 176 Units	39,442 62	40,781 48
Fidelity Fund 3,953.629 Units	128,809 23	92,670.61
Massachusetts Investors Trust - A 4,128.123 Units	80,911 21	61,928.87
Pioneer Bond Fund, Class Y 5,755 33 Units	55,078 51	63,044 96
Templeton Global Income Fund, Inc. 28,218.2427 Units	277,667 51	241,369 07
Vanguard Wellington Fund 1,037.987 Units	33,599 64	20,586 83
Virtus Strategic Growth Fund - A 61,154 551 Units	557,117.96	648,089.76
Virtus Tactical Allocation Fund - A 9,792.908 Units	89,703.04	61,009.43
Notes and Mortgages		
Carol J. Roberts Mortgage	19,053 45	19,053 45
Climmie L. Boyer, Jr, Clark St 2002	25,694 09	25,694 09
Estate of Priscilla Cindy Duke Mortgage	61,158 02	61,158 02
James and Ann Saurman, Osceola Mortgage	100,000 00	100,000 00
Warner Chapel Note and Mortgage	74,174.00	74,174 00
	$10,691,628.47	$4,716,386.64
Less: Income balance on hand	31,944 78	31,944.78
PRINCIPAL BALANCE ON HAND	$10,659,683 69	$4,684,441.86