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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter Social Security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf.*

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , and ending

Name of foundation: ANNE AND PAUL MARCUS FAMILY FOUNDATION

A Employer identification number: 01-6220476

Number and street (or P O box number if mail is not delivered to street address): 260 FRANKLIN STREET

Room/suite: 6TH FL

B Telephone number: 617 556 5200

City or town, state or province, country, and ZIP or foreign postal code: BOSTON, MA 02110

C If exemption application is pending, check here ▶ ☐

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

D 1 Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: [X] Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶$ 3,242,894.

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

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	603,541.			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	153.	153.	153.	STATEMENT 2
	4 Dividends and interest from securities	18,437.	18,091.	18,437.	STATEMENT 3
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	11,363.			STATEMENT 1
	b Gross sales price for all assets on line 6a 754,319.				
	7 Capital gain net income (from Part IV, line 2)		130,931.		
	8 Net short-term capital gain			19,366.	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total.** Add lines 1 through 11	633,494.	149,175.	37,956.	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 4	325.	0.	0.	325.
	b Accounting fees STMT 5	3,467.	1,000.	1,000.	2,467.
	c Other professional fees STMT 6	145,889.	0.	0.	145,889.
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	2,365.	1,813.	1,813.	552.
	24 **Total operating and administrative expenses** Add lines 13 through 23	152,046.	2,813.	2,813.	149,233.
	25 Contributions, gifts, grants paid	472,310.			472,310.
	26 **Total expenses and disbursements.** Add lines 24 and 25	624,356.	2,813.	2,813.	621,543.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	9,138.			
	b **Net investment income** (if negative, enter -0-)		146,362.		
	c **Adjusted net income** (if negative, enter -0-)			35,143.	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	2.		
	2 Savings and temporary cash investments	2,611,029.	2,592,645.	2,592,645.
	3 Accounts receivable ▶ 748.			
	Less: allowance for doubtful accounts ▶	740.	748.	748.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	527,418.	558,444.	549,971.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	102,978.	99,468.	99,530.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	3,242,167.	3,251,305.	3,242,894.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	3,242,167.	3,251,305.	
	30 **Total net assets or fund balances**	3,242,167.	3,251,305.	
	31 **Total liabilities and net assets/fund balances**	3,242,167.	3,251,305.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	3,242,167.
2 Enter amount from Part I, line 27a	2	9,138.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,251,305.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,251,305.

Part IV Capital Gains and Losses for Tax on Investment Income

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

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e	754,319.		623,388.	130,931.

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				130,931.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	130,931.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	19,366.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	407,703.	2,500,286.	.163063
2011	1,098,740.	3,298,996.	.333053
2010	1,463,905.	3,654,484.	.400578
2009	2,079,017.	5,150,282.	.403671
2008	3,701,714.	8,257,899.	.448263

2 **Total** of line 1, column (d)	2	1.748628
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.349726
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2,973,115.
5 Multiply line 4 by line 3	5	1,039,776.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,464.
7 Add lines 5 and 6	7	1,041,240.
8 Enter qualifying distributions from Part XII, line 4	8	621,543.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b		1	2,927.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,927.
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	2,927.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a 4,114.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	4,114.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached		8	
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	1,187.
11 Enter the amount of line 10 to be: **Credited to 2014 estimated tax** ▶ 1,187. **Refunded** ▶		11	0.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (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 STMT 10	10	X	

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Part VII-A Statements Regarding Activities *(continued)*

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation 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		X
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. ▶ 617 556 5200

Located at ▶ 260 FRANKLIN STREET, BOSTON, MA ZIP+4 ▶ 02110

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

		Line	Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	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 ▶			

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

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

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception**. Check "No" *if the foundation agreed to make a grant to or to employ the official for a period after* termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see 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 2013?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ______, ______, ______, ______				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2013 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 2013.)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?		4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X |

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A | 7b | | |

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ANNE P MARCUS 77 HEATH STREET BROOKLINE, MA 02445	TRUSTEE 8.00	0.	0.	0.
PAUL R MARCUS 77 HEATH STREET BROOKLINE, MA 02445	TRUSTEE 2.00	0.	0.	0.
RICHARD R RUDMAN PIPER RUDNICK, 33 ARCH STREET, 26TH F BOSTON, MA 02110	TRUSTEE 0.00	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
JAY W O'BRIEN 48 BROOKS AVE, ARLINGTON, MA 02474	DESIGN/IMPLEMENTATIO N OF WEBSITE FOR EXC	58,200.
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 DESIGN AND IMPLEMENTATION OF AUTISM RESEARCH. COORDINATION AND MANAGEMENT OF THE AUTISM CONSORTIUM.	55,000.
2 SEE STATEMENT 11	84,814.
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	653,011.
b	Average of monthly cash balances	1b	2,365,380.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	3,018,391.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	3,018,391.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	45,276.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,973,115.
6	**Minimum investment return.** Enter 5% of line 5	6	148,656.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ [X] and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a		
b	Income tax for 2013. (This does not include the tax from Part VI.) — 2b		
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
6	Deduction from distributable amount (see instructions)	6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	621,543.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	621,543.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	621,543.

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

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Part XIII **Undistributed Income** (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years: ____ , ____ , ____				
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ $				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see instructions				
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.				
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7				
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section [X] 4942(j)(3) or [ ] 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	35,143.	11,671.	22,170.	28,678.	97,662.
b 85% of line 2a	29,872.	9,920.	18,845.	24,376.	83,013.
c Qualifying distributions from Part XII, line 4 for each year listed	621,543.	407,703.	1,098,740.	1,464,192.	3,592,178.
d Amounts included in line 2c not used directly for active conduct of exempt activities	481,498.	251,938.	963,110.	1,276,004.	2,972,550.
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	140,045.	155,765.	135,630.	188,188.	619,628.
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)					0.
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	99,104.	83,343.	109,967.	121,816.	414,230.
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					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					0.

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)

1 **Information Regarding Foundation Managers:**

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

SEE STATEMENT 12

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ [ ] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

SEE STATEMENT 13

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution **	Amount
a Paid during the year				
AUTISIM CONSORTIUM 260 FRANKLIN STREET, RM 260 BOSTON, MA 02110	NONE	PUBLIC CHARITY	UNRESTRICTED	29,000.
BHS 21ST CENTRUY FUND 115 GREENOUGH STREET BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
BIG BROTHERS BIG SISTERS OF MASS BAY 75 FEDERAL STREET BOSTON, MA 02210	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
BOSTON CHILDREN'S HOSPITAL 401 PARK DRIVE, SUITE 602 BOSTON, MA 02115	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
BOY SCOUTS OF AMERICA 411 UNIQUITY RD MILTON, MA 02186	NONE	PUBLIC CHARITY	UNRESTRICTED	1,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	472,310.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	153.	
4 Dividends and interest from securities			14	18,437.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	11,363.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		29,953.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 29,953.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
3	INTEREST ON FOUNDATION ENDOWMENT
4	DIVIDENDS ON FOUNDATION ENDOWMENT
8	GAINS ON TRADING OF FOUNDATION SECURITIES

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

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

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

b If "Yes," complete the following schedule.

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

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

Signature of officer or trustee — Date 11/7/14 — Title TRUSTEE

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
EDWARD GIARDINA		11/6/14		P00075888

Firm's name ▶ GIARDINA & FRENCH CPAS, LLC — Firm's EIN ▶ 46-1307047

Firm's address ▶ 33 BROAD STREET, 5TH FL BOSTON, MA 02109 — Phone no. 617-720-5520

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www.irs.gov/form990.*

OMB No 1545-0047

2013

Name of the organization: ANNE AND PAUL MARCUS FAMILY FOUNDATION

Employer identification number: 01-6220476

Organization type (check one).

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. *Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions*

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not total to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions of $5,000 or more during the year ▶ $ ______________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization	Employer identification number
ANNE AND PAUL MARCUS FAMILY FOUNDATION	01-6220476

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ANNE AND PAUL MARCUS 77 HEATH STREET BROOKLINE, MA 02445	$ 10,967.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
2	ANNE AND PAUL MARCUS 77 HEATH STREET BROOKLINE, MA 02445	$ 592,574.	Person [ ] Payroll [ ] Noncash [X] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
ANNE AND PAUL MARCUS FAMILY FOUNDATION	01-6220476

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	MARKETABLE SECURITIES - STOCKS	$ 592,574.	12/17/13

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization	Employer identification number
ANNE AND PAUL MARCUS FAMILY FOUNDATION	01-6220476

Part III *Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once.) ▶ $

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
POWER SHARES DB AGRI 1256 S/T PORTION	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	2,618.	0.	0.	-2,618.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
POWER SHARES DB AGRI 1256 L/T PORTION	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	3,928.	0.	0.	-3,928.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
US BRENT OIL FD 1256 S/T PORTION	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
766.	0.	0.	0.	766.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
US BRENT OIL FD 1256 L/T PORTION	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,148.	0.	0.	0.	1,148.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
POWER SHARES DB OIL FD 1256 S/T PORTION	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
762.	0.	0.	0.	762.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
POWER SHARES DB OIL 1256 L/T PORTION	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1,143.	0.	0.	0.	1,143.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
POWER SHARES DB OIL S/T GAIN	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
1.	0.	0.	0.	1.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINL SERVICES 2443	DONATED		

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
126,305.	126,371.	0.	0.	-66.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINL SERVICES 2443	DONATED		

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
466,639.	466,203.	0.	0.	436.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
SPDR GOLD TR GOLD SHRS	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
3.	4.	0.	0.	-1.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
SPDR GOLD TR GOLD SHRS	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
312.	374.	0.	0.	-62.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINL SERVICES 8997 S/T TRANS	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
129,397.	120,535.	0.	0.	8,862.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINL SERVICES 8997 S/T TRANS	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
37.	0.	0.	0.	37.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINL SERVICES 8997 L/T TRANS	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
26,838.	22,923.	0.	0.	3,915.

CAPITAL GAINS DIVIDENDS FROM PART IV	968.
TOTAL TO FORM 990-PF, PART I, LINE 6A	11,363.

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
FIDELITY INVESTMENTS	110.	110.	110.
POWERSHARES DB AGRCULTURE FUND	26.	26.	26.
POWERSHARES DB OIL FUND	13.	13.	13.
US BRENT OIL FUND	4.	4.	4.
TOTAL TO PART I, LINE 3	153.	153.	153.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
NATIONAL FINANCIAL SERVICES	9,397.	743.	8,654.	8,654.	8,654.
NATIONAL FINANCIAL SERVICES	10,004.	225.	9,779.	9,433.	9,779.
US BRENT OIL FUND	4.	0.	4.	4.	4.
TO PART I, LINE 4	19,405.	968.	18,437.	18,091.	18,437.

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	325.	0.	0.	325.
TO FM 990-PF, PG 1, LN 16A	325.	0.	0.	325.

FORM 990-PF ACCOUNTING FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	3,467.	1,000.	1,000.	2,467.
TO FORM 990-PF, PG 1, LN 16B	3,467.	1,000.	1,000.	2,467.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTANTS	145,889.	0.	0.	145,889.
TO FORM 990-PF, PG 1, LN 16C	145,889.	0.	0.	145,889.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE FILING FEES	500.	0.	0.	500.
INVESTMENT EXPENSES	1,406.	1,406.	1,406.	0.
BANK CHARGES	407.	407.	407.	0.
DELIVERY	52.	0.	0.	52.
TO FORM 990-PF, PG 1, LN 23	2,365.	1,813.	1,813.	552.

FORM 990-PF CORPORATE STOCK STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FIDELITY INVESTMENTS 472433	285,214.	251,462.
FIDELITY INVESTMENTS 168997	273,230.	298,509.
TOTAL TO FORM 990-PF, PART II, LINE 10B	558,444.	549,971.

FORM 990-PF OTHER INVESTMENTS STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
POWERSHARES DB AGRCULTURE FUND	COST	47,524.	46,487.
POWERSHARES DB OIL FUND	COST	26,413.	26,319.
US BRENT OIL FUND	COST	25,531.	26,724.
TOTAL TO FORM 990-PF, PART II, LINE 13		99,468.	99,530.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS STATEMENT 10
PART VII-A, LINE 10

NAME OF CONTRIBUTOR	ADDRESS
PAUL AND ANNE MARCUS	77 HEATH STREET BROOKLINE, MA 02445

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 11

ACTIVITY TWO

DESIGN WEBSITE TO PRESENT STREAMLINED ACCESS TO RELEVANT KNOWLEDGE, SKILLS AND RESORCES FAMILIES NEED AT KEY TRANSITION POINTS IN THEIR EXCEPTIONAL CHILDREN'S LIVES. THESE CHILDREN HAVE PEDIARIC-ONCET DISABILITIES, PARTICULARLY NEURODEVELOPMENTAL, INTELLECTUAL, PHYSICAL AND LEARNING DISABLITIES.

	EXPENSES
TO FORM 990-PF, PART IX-A, LINE 2	84,814.

FORM 990-PF PART XV - LINE 1A STATEMENT 12

LIST OF FOUNDATION MANAGERS

NAME OF MANAGER
ANNE P MARCUS
PAUL R MARCUS

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

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

Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

Cost Basis of Donated Stocks ANNE/PAUL MARCUS FAMILY FNDTN
To Anne + Paul Marcus Family Foundation

Account No. Z75-472433 Customer Service: 781-274-9300
Recipient ID No. 01-6220476 Payer's Fed ID Number: 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS –report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**) Market Value @ Contribution Date

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld (Market Value @ Contribution Date)	13 State	15 State Tax Withheld
AGL RES INC, GAS, 001204106										
Sale	12/18/13	01/02/13	202.000	9,345.32	8,227.33	1,117.99	46.27	10,225.67		
Sale	12/18/13	06/03/13	19.000	879.02	813.55	65.47				
Subtotals				**10,224.34**	**9,040.88**					
ALLETE INC COM NEW, ALE, 018522300										
Sale	12/18/13	06/03/13	27.000	1,336.20	1,315.56	20.64	49.28	1330.56		
AMERICAN ELEC PWR CO, AEP, 025537101										
Sale	12/18/13	06/03/13	14.000	641.21	653.91	-12.70	45.82	4169.62		
Sale	12/18/13	10/01/13	77.000	3,526.67	3,374.39	152.28				
Subtotals				**4,167.88**	**4,028.30**					
AQUA AMERICA INC, WTR, 03836W103										
Sale	12/18/13	12/02/13	222.000	5,231.75	5,267.13	-35.38	23.42	5199.24		
BANK HAWAII CORP, BOH, 062540109										
Sale	12/18/13	06/03/13	191.000	10,954.30	9,568.59	1,385.71	57.58	10,997.78		
CAMPBELL SOUP CO, CPB, 134429109										
Sale	12/18/13	12/02/13	142.000	6,035.44	5,491.99	543.45	42.74	6069.08		
CLECO CORP, CNL, 12561W105										
Sale	12/18/13	06/03/13	17.000	789.89	784.68	5.21	46.30	5972.70		
Sale	12/18/13	12/02/13	112.000	5,203.99	5,078.19	125.80				
Subtotals				**5,993.88**	**5,862.87**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. Z75-472433 Customer Service: 781-274-9300
Recipient ID No. 01-6220476 Payer's Fed ID Number: 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

Market Value at Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
CMS ENERGY CORP, CMS, 125896100										
Sale	12/18/13	10/01/13	137.000	3,620.14	3,622.01	-1.87	26.45	3623.65		
CULLEN FROST BANKERSINC, CFR, 229899109										
Sale	12/18/13	05/01/13	172.000	12,254.71	10,286.67	1,968.04	71 54	12304.88		
DTE ENERGY HOLDING CO, DTE, 233331107										
Sale	12/18/13	06/03/13	11.000	718.77	742.86	-24.09	65.28	5809.92		
Sale	12/18/13	12/02/13	78.000	5,096.71	5,216.79	-120.08				
Subtotals				**5,815.48**	**5,959.65**					
LOCKHEED MARTIN CORP, LMT, 539830109										
Sale	12/18/13	05/01/13	17.000	2,392.04	1,696.90	695.14	140.85	2394.45		
MARSH & MCLENNAN COS, MMC, 571748102										
Sale	12/18/13	05/01/13	45.000	2,127.61	1,710.30	417.31	47.21	2124.45		
MERCK & CO INC NEW COM, MRK, 58933Y105										
Sale	12/18/13	04/01/13	54.000	2,581.96	2,402.85	179.11	47.90	2586.60		
MGE ENERGY INC, MGEE, 55277P104										
Sale	12/18/13	05/01/13	30.000	1,670.39	1,621.05	49.34	55.97	1679.10		
NORTHWEST BANCSHARESINC COM, NWBI, 667340103										
Sale	12/18/13	05/01/13	157.000	2,289.17	1,890.38	398.79	14.58	2289.06		

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN | Account No. Z75-472433 | Customer Service: 781-274-9300
Recipient ID No. 01-6220476 | Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions — Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

Market Value @ Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
PEOPLES UTD FINL INC, PBCT, 712704105										
Sale	12/18/13	03/01/13	649.000	9,481.69	8,600.71	880.98	14.63	11586.96		
Sale	12/18/13	05/01/13	143.000	2,089.19	1,878.39	210.80				
Subtotals				**11,570.88**	**10,479.10**					
PORTLAND GEN ELEC COCOM NEW, POR, 736508847										
Sale	12/18/13	10/01/13	144 000	4,337.44	4,136.43	201.01	30.11	4335.94		
PROCTER & GAMBLE CO, PG, 742718109										
Sale	12/18/13	05/01/13	24.000	1,950.24	1,855.71	94.53	80.91	1941.84		
RAYTHEON CO COM NEW, RTN, 755111507										
Sale	12/18/13	05/01/13	28.000	2,420.90	1,734.43	686.47	86.79	2430.12		
SOUTHWEST GAS CORP, SWX, 844895102										
Sale	12/18/13	06/03/13	15.000	794.16	733.05	61.11	52.82	792.30		
SYSCO CORP, SYY, 871829107										
Sale	12/18/13	10/01/13	118.000	4,244.53	3,770.97	473.56	36.03	4251.54		
UNS ENERGY CORP COM NPV, UNS, 903119105										
Sale	12/18/13	07/01/13	44.000	2,601.26	1,987.95	613.31	58.90	2591.60		
VECTREN CORP, VVC, 92240G101										
Sale	12/18/13	11/01/13	93.000	3,234.24	3,260.16	-25.92	34.57	3215.01		
VERIZON COMMUNICATIONS, VZ, 92343V104										
Sale	12/18/13	06/03/13	20.000	955.38	981.15	-25.77	47.56	951.26		

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN   Account No. Z75-472433   Customer Service: 781-274-9300
Recipient ID No. 01-6220476   Payer's Fed ID Number: 04-3523567

FORM 1099-B*   2013 Proceeds from Broker and Barter Exchange Transactions   Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

Market Value at Contribution Dt

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
WALMART STORES INC, WMT, 931142103										
Sale	12/18/13	06/03/13	12.000	926.34	916.23	10.11	77.25	927.06		
WASTE MANAGEMENT INC, WM, 94106L109										
Sale	12/18/13	08/01/13	61.000	2,629.58	2,602.89	26.69	43.46	2651.06		
WESTAMERICA BANCORPORATION, WABC, 957090103										
Sale	12/18/13	08/01/13	244.000	13,327.85	11,901.32	1,426.53	54.54	13,307.76		
WISCONSIN ENERGY CP, WEC, 976657106										
Sale	12/18/13	06/03/13	15.000	616.57	623.55	-6.98	40.80	612.00		
TOTALS				126,304.66	114,748.07			0.00		
	Box A Short-Term Realized Gain					11,809.38		126,371.09		
	Box A Short-Term Realized Loss					-252.79				
	Box A Wash Sale Loss Disallowed						0.00			

short Term gain per Books

Sale Proceeds 126,304.66
Market value at Cont. Date 126,371.09
<66.43>

A-1

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. Z75-472433 Customer Service: 781-274-9300
Recipient ID No. 01-6220476 Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions Copy B for Recipient OMB NO 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in **bold type**)

Market Value at Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
ALLETE INC COM NEW, ALE, 018522300										
Sale	12/18/13	03/05/12	151.000	7,472.83	6,251.78	1,221.05	49.28	8426.88		
Sale	12/18/13	12/03/12	20.000	989.78	796.15	193.63				
Subtotals				**8,462.61**	**7,047.93**					
ALLIANT ENERGY CORP, LNT, 018802108										
Sale	12/18/13	03/05/12	168.000	8,632.87	7,148.98	1,483.89	51.43	9514.55		
Sale	12/18/13	11/01/12	17.000	873.56	770.06	103.50				
Subtotals				**9,506.43**	**7,919.04**					
AMERICAN ELEC PWR CO, AEP, 025537101										
Sale	12/18/13	03/05/12	176.000	8,060.96	6,740.52	1,320.44	45.82	8705.80		
Sale	12/18/13	12/03/12	14.000	641.21	599.87	41.34				
Subtotals				**8,702.17**	**7,340.39**					
AQUA AMERICA INC, WTR, 03836W103										
Sale	12/18/13	03/05/12	383.000	9,025.95	6,819.28	2,206.67	23.42	8969.86		
ATMOS ENERGY CORP, ATO, 049560105										
Sale	12/18/13	03/05/12	217.000	9,682.67	6,783.70	2,898.97	44.34	9,621.78		
AUTOMATIC DATA PROCESSING INC, ADP, 053015103										
Sale	12/18/13	03/05/12	132.000	10,351.18	7,200.02	3,151.16	77.25	11,046.75		
Sale	12/18/13	11/01/12	11.000	862.60	660.91	201.69				
Subtotals				**11,213.78**	**7,860.93**					

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2013 TAX REPORTING STATEMENT

Fidelity INVESTMENTS

ANNE/PAUL MARCUS FAMILY FNDTN — Account No. Z75-472433 — Customer Service: 781-274-9300
Recipient ID No. 01-6220476 — Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
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Market Value at Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
BEMIS COMPANY INC, BMS, 081437105										
Sale	12/18/13	03/05/12	232.000	9,175.94	7,340.96	1,834.98	39.46	9865.00		
Sale	12/18/13	05/01/12	18.000	711.93	585.00	126.93				
Subtotals				**9,887.87**	**7,925.96**					
CALIFORNIA WATER SVCGRP HLDG CO, CWT, 130788102										
Sale	12/18/13	03/05/12	374.000	8,289.37	6,814.12	1,475.25	22.15	9923.20		
Sale	12/18/13	05/01/12	41.000	908.73	738.82	169.91				
Sale	12/18/13	11/01/12	33.000	731.41	612.18	119.23				
Subtotals				**9,929.51**	**8,165.12**					
CAMPBELL SOUP CO, CPB, 134429109										
Sale	12/18/13	03/05/12	234.000	9,945.73	7,739.31	2,206.42	42.74	10,001.16		
CENTERPOINT ENERGY INC, CNP, 15189T107										
Sale	12/18/13	03/05/12	371.000	8,445.91	7,171.38	1,274.53	22 89	9407.79		
Sale	12/18/13	12/03/12	40.000	910.61	798.35	112.26				
Subtotals				**9,356.52**	**7,969.73**					
CINCINNATI FINL CORP, CINF, 172062101										
Sale	12/18/13	03/05/12	202 000	10,213.01	7,133.83	3,079.18	50.67	10,235.34		
CLECO CORP, CNL, 12561W105										
Sale	12/18/13	03/05/12	189.000	8,781.73	7,297.17	1,484.56	46.30	8750.70		
CMS ENERGY CORP, CMS, 125896100										
Sale	12/18/13	04/02/12	326.000	8,614.34	7,277.18	1,337.16	26.45	8622.70		

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN

Account No. Z75-472433 Customer Service: 781-274-9300
Recipient ID No. 01-6220476 Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
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Market Value at Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
DOMINION RESOURCES INC VA NEW, D, 25746U109										
Sale	12/18/13	03/05/12	142.000	9,057.43	7,223.77	1,833.66	63.88	9965.28		
Sale	12/18/13	11/01/12	14.000	892.99	736.23	156.76				
Subtotals				**9,950.42**	**7,960.00**					
DTE ENERGY HOLDING CO, DTE, 233331107										
Sale	12/18/13	03/05/12	129.000	8,429.16	7,019.56	1,409.60	65.28	8421.12		
GALLAGHER ARTHUR J &CO, AJG, 363576109										
Sale	12/18/13	03/05/12	210.000	9,585.46	7,246.02	2,339.44	45.53	10,608.49		
Sale	12/18/13	11/01/12	23.000	1,049.84	833.88	215.96				
Subtotals				**10,635.30**	**8,079.90**					
GENUINE PARTS CO, GPC, 372460105										
Sale	12/18/13	03/05/12	124.000	9,995.21	7,792.67	2,202.54	80.56	9,989.44		
IDACORP INC, IDA, 451107106										
Sale	12/18/13	04/02/12	188.000	10,006.63	7,776.11	2,230.52	53.16	9994.08		
JOHNSON & JOHNSON, JNJ, 478160104										
Sale	12/18/13	03/05/12	120.000	10,907.06	7,797.15	3,109.91	90.66	10,879.20		
KIMBERLY CLARK CORP, KMB, 494368103										
Sale	12/18/13	03/05/12	90.000	9,300.41	6,546.09	2,754.32	102.75	10,172.25		
Sale	12/18/13	11/01/12	9.000	930.04	761.79	168.25				
Subtotals				**10,230.45**	**7,307.88**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. Z75-472433 Customer Service: 781-274-9300
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FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO: 1545-0715

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LOCKHEED MARTIN CORP, LMT, 539830109										
Sale	12/18/13	03/05/12	63.000	8,864.61	5,592.53	3,272.08	140.85	8873.55		
MARSH & MCLENNAN COS, MMC, 571748102										
Sale	12/18/13	03/05/12	229.000	10,827.15	7,310.09	3,517.06	47.21	10,811.09		
MERCK & CO INC NEW COM, MRK, 58933Y105										
Sale	12/18/13	03/05/12	172.000	8,224.00	6,620.10	1,603.90	47.90	8,238.80		
MGE ENERGY INC, MGEE, 55277P104										
Sale	12/18/13	03/05/12	146.000	8,129.20	6,461.18	1,668.02	55.97	8,787.29		
Sale	12/18/13	11/01/12	11.000	612.47	581.27	31.20				
Subtotals				**8,741.67**	**7,042.45**					
NEXTERA ENERGY INC COM, NEE, 65339F101										
Sale	12/18/13	03/05/12	110.000	9,126.19	6,589.07	2,537.12	82.63	9750.34		
Sale	12/18/13	11/01/12	8.000	663.72	566.91	96.81				
Subtotals				**9,789.91**	**7,155.98**					
NISOURCE INC, NI, 65473P105										
Sale	12/18/13	09/04/12	323.000	10,082.39	7,986.05	2,096.34	31.06	10,032.38		
NORTHROP GRUMMAN CORP HOLDING CO, NOC, 666807102										
Sale	12/18/13	03/05/12	120.000	13,028.62	7,198.94	5,829.68	109.57	13,148.40		

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN

Account No. Z75-472433 Customer Service: 781-274-9300
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Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
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Market Value at Contribution Date

8 Description, 1d Stock or Other Symbol, CUSIP

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
NORTHWEST BANCSHARESINC COM, NWBI, 667340103										
Sale	12/18/13	03/05/12	617.000	8,996.32	7,708.11	1,288.21	14.58	10,103.94		
Sale	12/18/13	11/01/12	76.000	1,108.14	913.11	195.03				
Subtotals				**10,104.46**	**8,621.22**					
NORTHWESTERN CORP COM NEW, NWE, 668074305										
Sale	12/18/13	03/05/12	209.000	9,011.91	7,299.43	1,712.48	43.13	9,919.90		
Sale	12/18/13	11/01/12	21.000	905.50	758.07	147.43				
Subtotals				**9,917.41**	**8,057.50**					
OGE ENERGY CORP HOLDING CO, OGE, 670837103										
Sale	12/18/13	03/05/12	296.000	9,894.25	7,729.11	2,165.14	33.55	9930.80		
PAYCHEX INC, PAYX, 704326107										
Sale	12/18/13	03/05/12	233.000	10,044.14	7,330.63	2,713.51	42.90	10,896.60		
Sale	12/18/13	11/01/12	21.000	905.27	707.25	198.02				
Subtotals				**10,949.41**	**8,037.88**					
PEPSICO INC, PEP, 713448108										
Sale	12/18/13	03/05/12	113.000	9,123.42	7,102.51	2,020.91	80.46	9,091.98		
PORTLAND GEN ELEC COCOM NEW, POR, 736508847										
Sale	12/18/13	03/05/12	266.000	8,012.20	6,558.27	1,453.93	30.11	8671.68		
Sale	12/18/13	05/01/12	22.000	662.66	566.50	96.16				
Subtotals				**8,674.86**	**7,124.77**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN — Account No. Z75-472433 — Customer Service: 781-274-9300
Recipient ID No. 01-6220476 — Payer's Fed ID Number: 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** — Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in **bold type**)

Market Value @ Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
PROCTER & GAMBLE CO, PG, 742718109										
Sale	12/18/13	03/05/12	100.000	8,126.01	6,701.91	1,424.10	80.91	9,061.92		
Sale	12/18/13	05/01/12	12.000	975.12	762.84	212.28				
Subtotals				**9,101.13**	**7,464.75**					
RAYTHEON CO COM NEW, RTN, 755111507										
Sale	12/18/13	03/05/12	101.000	8,732.54	5,218.83	3,513.71	86.79	8,765.79		
REYNOLDS AMERN INC, RAI, 761713106										
Sale	12/18/13	03/05/12	171.000	8,313.85	7,261.13	1,052.72	48.60	9,622.80		
Sale	12/18/13	11/01/12	27.000	1,312.71	1,135.20	177.51				
Subtotals				**9,626.56**	**8,396.33**					
SEMPRA ENERGY, SRE, 816851109										
Sale	12/18/13	03/05/12	118.000	10,254.50	6,957.36	3,297.14	87.25	10,295.50		
SONOCO PRODS CO, SON, 835495102										
Sale	12/18/13	03/05/12	237.000	9,707.79	7,919.01	1,788.78	40.93	10,519.01		
Sale	12/18/13	09/04/12	20.000	819.22	623.75	195.47				
Subtotals				**10,527.01**	**8,542.76**					
SOUTHWEST GAS CORP, SWX, 844895102										
Sale	12/18/13	03/05/12	183.000	9,688.74	7,893.42	1,795.32	52.82	9,666.06		
SYSCO CORP, SYY, 871829107										
Sale	12/18/13	03/05/12	265.000	9,532.22	7,814.85	1,717.37	36.03	9,547.95		

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. Z75-472433 Customer Service: 781-274-9300
Recipient ID No. 01-6220476 Payer's Fed ID Number: 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

Market Value @ Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	16 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
UGI CORP NEW, UGI, 902681105										
Sale	12/18/13	03/05/12	255.000	10,155.62	7,206.00	2,949.62	39.86	10,164.30		
UNITED PARCEL SVC INC CL B, UPS, 911312106										
Sale	12/18/13	03/05/12	93.000	9,503.96	7,105.08	2,398.88	101.98	11,523.74		
Sale	12/18/13	05/01/12	11.000	1,124.12	863.17	260.95				
Sale	12/18/13	11/01/12	9.000	919.74	673.05	246.69				
Subtotals				**11,547.82**	**8,641.30**					
UNS ENERGY CORP COM NPV, UNS, 903119105										
Sale	12/18/13	03/05/12	192.000	11,350.94	7,166.88	4,184.06	58.90	11308.80		
VECTREN CORP, VVC, 92240G101										
Sale	12/18/13	03/05/12	267.000	9,285.39	7,809.69	1,475.70	34.57	9,230.19		
VERIZON COMMUNICATIONS, VZ, 92343V104										
Sale	12/18/13	03/05/12	173.000	8,264.03	6,753.74	1,510.29	47.56	8,227.88		
WALMART STORES INC, WMT, 931142103										
Sale	12/18/13	03/05/12	91.000	7,024.75	5,410.89	1,613.86	77.25	8,729.25		
Sale	12/18/13	05/01/12	14.000	1,080.73	826.98	253.75				
Sale	12/18/13	12/03/12	8.000	617.56	578.67	38.89				
Subtotals				**8,723.04**	**6,816.54**					
WASTE MANAGEMENT INC, WM, 94106L109										
Sale	12/18/13	03/05/12	188.000	8,104.27	6,605 50	1,498.77	43.46	9,430.82		
Sale	12/18/13	11/01/12	29.000	1,250.13	964.95	285.18				

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. Z75-472433 Customer Service: 781-274-9300
Recipient ID No. 01-6220476 Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold type**) Market Value at Contribution Date

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	16 State Tax Withheld
WASTE MANAGEMENT INC, WM, 94106L109										
Subtotals				9,354.40	7,570.45					
WISCONSIN ENERGY CP, WEC, 976657106										
Sale	12/18/13	03/05/12	194.000	7,974.28	6,637.65	1,336.63	40.80	8731.20		
Sale	12/18/13	11/01/12	20.000	822.09	775.15	46.94				
Subtotals				8,796.37	7,412.80					
TOTALS				466,639.02	358,257.67			0.00		
Box D Long-Term Realized Gain						108,381.35		466,203.33		
Box D Long-Term Realized Loss						0.00				
Box D Wash Sale Loss Disallowed							0.00			

Long Term Gain Books 466,639.02
Market Value at Donation <466,203.33>
L/T Gain for Books - 435.69

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN | Account No. **Z75-472433** | Customer Service 781-274-9300
Recipient ID No. **01-6220476** | Payer's Fed ID Number 04-3523567

Copy B for Recipient OMB NO 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
SPDR GOLD TR GOLD SHS, GLD, 78463V107										
Principal	01/07/13	02/24/12	0.000	1.58	1 70	-0.12				
Principal	02/21/13	02/24/12	0 000	1.62	1.83	-0.21				
Subtotals				**3.20**	**3.53**					
TOTALS				**3.20**	**3.53**			**0.00**		
	Box B Short-Term Realized Gain					**0.00**				
	Box B Short-Term Realized Loss					**-0.33**				
	Box B Wash Sale Loss Disallowed						**0.00**			

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No **Z75-472433** Customer Service: 781-274-9300
Recipient ID No **01-6220476** Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
SPDR GOLD TR GOLD SHS, GLD, 78463V107										
Principal	01/07/13	10/17/11	0 000	10 50	10 67	-0 17				
Principal	01/07/13	10/18/11	0.000	10.77	10.81	-0 04				
Principal	01/07/13	11/09/11	0 000	5.25	5 64	-0.39				
Principal	02/21/13	10/17/11	0.000	10 86	11.50	-0 64				
Principal	02/21/13	10/18/11	0 000	11 13	11 66	-0 53				
Principal	02/21/13	11/09/11	0.000	5.43	6 08	-0 65				
Principal	03/12/13	10/17/11	0.000	10.55	11.06	-0.51				
Principal	03/12/13	10/18/11	0.000	10 81	11 20	-0 39				
Principal	03/12/13	11/09/11	0 000	5.27	5.85	-0.58				
Principal	03/12/13	02/24/12	0.000	1.58	1.76	-0 18				
Principal	04/09/13	10/17/11	0 000	10 80	11.44	-0 64				
Principal	04/09/13	10/18/11	0 000	11 07	11.59	-0.52				
Principal	04/09/13	11/09/11	0 000	5.40	6 05	-0.65				
Principal	04/09/13	02/24/12	0.000	1.62	1.82	-0.20				
Principal	05/10/13	10/17/11	0 000	11 14	13 06	-1 92				
Principal	05/10/13	10/18/11	0 000	11.42	13.23	-1.81				
Principal	05/10/13	11/09/11	0.000	5 57	6.90	-1.33				
Principal	05/10/13	02/24/12	0.000	1.68	2.08	-0.40				
Principal	06/17/13	10/17/11	0.000	9 75	11.76	-2.01				
Principal	06/17/13	10/18/11	0.000	9.99	11.92	-1.93				
Principal	06/17/13	11/09/11	0.000	4.87	6.22	-1 35				
Principal	06/17/13	02/24/12	0.000	1 47	1.87	-0 40				

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **Z75-472433** Customer Service: 781-274-9300
Recipient ID No **01-6220476** Payer's Fed ID Number: 04-3523567

Copy B for Recipient OMB NO. 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
SPDR GOLD TR GOLD SHS, GLD, 78463V107										
Principal	07/10/13	10/17/11	0 000	9 60	12 77	-3 17				
Principal	07/10/13	10/18/11	0.000	9.84	12 94	-3.10				
Principal	07/10/13	11/09/11	0 000	4.80	6 75	-1.95				
Principal	07/10/13	02/24/12	0.000	1.43	2.03	-0.60				
Principal	08/15/13	10/17/11	0.000	8 83	11.10	-2.27				
Principal	08/15/13	10/18/11	0 000	9 05	11 25	-2.20				
Principal	08/15/13	11/09/11	0 000	4.42	5.87	-1 45				
Principal	08/15/13	02/24/12	0.000	1.33	1.77	-0.44				
Principal	09/19/13	10/17/11	0.000	9 37	11 47	-2.10				
Principal	09/19/13	10/18/11	0 000	9 60	11.62	-2.02				
Principal	09/19/13	11/09/11	0 000	4 68	6.06	-1 38				
Principal	09/19/13	02/24/12	0.000	1 41	1 83	-0 42				
Principal	10/14/13	10/17/11	0.000	9.64	12 53	-2.89				
Principal	10/14/13	10/18/11	0.000	9.88	12.69	-2 81				
Principal	10/14/13	11/09/11	0 000	4 82	6 62	-1 80				
Principal	10/14/13	02/24/12	0 000	1 44	2 00	-0.56				
Principal	11/13/13	10/17/11	0 000	8 62	11.33	-2.71				
Principal	11/13/13	10/18/11	0.000	8 84	11 48	-2.64				
Principal	11/13/13	11/09/11	0.000	4 31	5 99	-1.68				
Principal	11/13/13	02/24/12	0 000	1 30	1 80	-0 50				
Principal	12/17/13	10/17/11	0.000	8.29	11.25	-2.96				
Principal	12/17/13	10/18/11	0 000	8 50	11.39	-2.89				

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN   Account No. **Z75-472433**   Customer Service: 781-274-9300
Recipient ID No. **01-6220476**   Payer's Fed ID Number 04-3523567

FORM 1099-B*   **2013 Proceeds from Broker and Barter Exchange Transactions**   Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis <u>is not reported</u> to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
SPDR GOLD TR GOLD SHS, GLD, 78463V107										
Principal	12/17/13	11/09/11	0 000	4 15	5.94	-1 79				
Principal	12/17/13	02/24/12	0 000	1.24	1.79	-0 55				
Subtotals				**312.32**	**374.44**					
TOTALS				**312.32**	**374.44**			**0.00**		
	Box E Long-Term Realized Gain					**0.00**				
	Box E Long-Term Realized Loss					**-62.12**				
	Box E Wash Sale Loss Disallowed						**0.00**			

For any transaction listed on Form 1099-B in a section indicating that **"basis <u>is reported</u> to the IRS"**, we are reporting to the IRS: **1c** type of gain or loss (i.e short-term or long-term), **6** basis reported to IRS, **8** Description, **1d** Stock or other symbol, the CUSIP number, and columns **1a**, **1b**, **1e**, **2a** and **2b**, **3**, **4**, **5**, **13**, **14** and **15** We are not reporting to the IRS the Action, the Gain / Loss, and all subtotals and totals

For any transaction listed on Form 1099-B in a section indicating that **"basis <u>is not reported</u> to the IRS"**, we are reporting to the IRS. **6** Noncovered security **8** Description, **1d** Stock or other symbol, the CUSIP number, and columns **1a**, **1e**, **2a** and **2b**, **4**, **13**, **14** and **15** We are not reporting to the IRS: **1c** type of gain or loss (i e short-term or long-term), the Action, the Gain / Loss, columns **1b**, **3**, **5**, and all subtotals and totals

Although Fidelity makes every effort to provide accurate information, please bear in mind that you, the taxpayer, are ultimately responsible for the accuracy of your tax returns

(a) Gross proceeds less commissions

(b) Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale loss disallowed, amortization, accretion, acquisition premium, bond premium, market discount, market premium, and option premium

Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments, unit investment trusts, or securities of foreign issuers.

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **656-168997** Customer Service: 781-274-9300
Recipient ID No. **01-6220476** Payer's Fed ID Number. 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

8 Description, **1d** Stock or Other Symbol, CUSIP										
Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
ABBOTT LABORATORIES, ABT, 002824100										
Sale	06/03/13	07/20/12	27.000	995.35	846.29	149.06				
Sale	06/03/13	11/01/12	3.000	111 47	98.01	13.46				
Sale	06/03/13	01/02/13	30.000	1,114.78	969.45	145.33				
Subtotals				**2,221.60**	**1,913.75**					
ABBVIE INC COM USD0.01, ABBV, 00287Y109										
Sale	01/10/13	07/20/12	27.000	910.02	917.73	-7 71				
Sale	01/10/13	11/01/12	3.000	101.99	106.29	-4.30				
Subtotals				**1,012.01**	**1,024.02**					
AIR PRODUCTS & CHEM, APD, 009158106										
Sale	02/01/13	07/20/12	4.000	346.96	323.10	23.86				
Sale	03/01/13	07/20/12	19.000	1,632.47	1,534.74	97.73				
Sale	03/01/13	11/01/12	2.000	172.67	164.20	8.47				
Subtotals				**2,152.10**	**2,022.04**					
ALLETE INC COM NEW, ALE, 018522300										
Sale	02/01/13	07/20/12	7.000	316.63	295.26	21.37				
AMERICAN CAMPUS CMNTYS INC, ACC, 024835100										
Sale	12/02/13	07/01/13	61.000	1,947.67	2,477.32	-529.65				
Sale	12/02/13	11/01/13	31.000	993.84	1,087.24	-93.40				
Subtotals				**2,941.51**	**3,564.56**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN   Account No **656-168997**   Customer Service 781-274-9300
Recipient ID No. **01-6220476**   Payer's Fed ID Number 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	15 State Tax Withheld
8 Description, 1d Stock or Other Symbol, CUSIP										
AMERICAN FINL GRP INC HOLDING CO, AFG, 025932104										
Sale	09/03/13	02/01/13	46.000	2,372.74	1,981 35	391.39				
AMERICAN NATL BANKSHARES INC DANVILLE VA, AMNB, 027745108										
Sale	04/01/13	07/20/12	4.000	79.02	92.97	-13.95				
Sale	04/02/13	07/20/12	29.000	591.70	674.01	-82.31				
Sale	04/03/13	07/20/12	33.000	664 32	766.99	-102.67				
Sale	04/04/13	07/20/12	12.000	241 05	278 90	-37.85				
Sale	04/04/13	11/01/12	14 000	273 27	305.53	-32 26				
Subtotals				**1,849.36**	**2,118.40**					
AMERICAN NATL INS CO N/C AMERICAN NATION, ANAT, 028591105										
Sale	07/01/13	07/20/12	26.000	2,655 60	1,856.29	799.31				
AMERICAN STATES WATER CO, AWR, 029899101										
Sale	02/01/13	07/20/12	7.000	352 19	287 27	64.92				
Sale	06/03/13	07/20/12	34.000	1,837.84	1,395.34	442 50				
Sale	06/03/13	11/01/12	3.000	162.16	139 36	22 80				
Sale	06/03/13	05/01/13	7.000	370 43	387.49	-17.06				
Subtotals				**2,722.62**	**2,209.46**					
ARES CAPITAL CORP COM STK USD0.001, ARCC, 04010L103										
Sale	08/01/13	03/01/13	107 000	1,922.75	1,984 24	-61.49				
Sale	08/01/13	05/01/13	28.000	495.20	509.15	-13 95				
Subtotals				**2,417.95**	**2,493.39**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **656-168997** Customer Service. 781-274-9300
Recipient ID No. **01-6220476** Payer's Fed ID Number: 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
8 Description, **1d** Stock or Other Symbol, CUSIP										
ARTESIAN RES CORP CL A, ARTNA, 043113208										
Sale	02/01/13	07/20/12	55.000	1,237 44	1,165.58	71.86				
Sale	02/01/13	11/01/12	6.000	134.92	149.69	-14.77				
Sale	02/01/13	12/03/12	7.000	149.61	151.52	-1.91				
Sale	02/04/13	07/20/12	23.000	506.39	487.43	18.96				
Subtotals				**2,028.36**	**1,954.22**					
AVALONBAY COMMUNITIES INC, AVB, 053484101										
Sale	03/01/13	01/02/13	14.000	1,758.95	1,912.37	-153.42				
BECTON DICKINSON CO, BDX, 075887109										
Sale	02/01/13	07/20/12	4.000	332.64	300.43	32.21				
Sale	06/03/13	07/20/12	19.000	1,876.81	1,427.05	449.76				
Sale	06/03/13	11/01/12	3.000	297.59	236.79	60.80				
Subtotals				**2,507.04**	**1,964.27**					
BLACK HILLS CORP, BKH, 092113109										
Sale	06/03/13	07/20/12	51.000	2,428.45	1,648.80	779.65				
BRISTOL MYERS SQUIBB, BMY, 110122108										
Sale	07/01/13	07/20/12	51 000	2,285.78	1,814 37	471.41				
Sale	07/01/13	09/04/12	4.000	171.32	139.19	32.13				
Subtotals				**2,457.10**	**1,953.56**					
BROADRIDGE FINANCIAL SOLUTIONS LLC, BR, 11133T103										
Sale	10/01/13	11/01/12	7.000	226.23	173.15	53.08				

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

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Recipient ID No. **01-6220476** Payer's Fed ID Number 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO. 1545-0715

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(IRS Form 1099-B box numbers are shown below in **bold** type)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
CAL MAINE FOODS INC, CALM, 128030202										
Sale	02/01/13	07/20/12	40.000	1,662.93	1,431.97	230.96				
Sale	02/01/13	11/01/12	5.000	208 86	226.65	-17.79				
Subtotals				**1,871.79**	**1,658.62**					
CARDINAL HEALTH INC, CAH, 14149Y108										
Sale	12/02/13	04/01/13	12.000	767.47	510.15	257.32				
CENTURYLINK INC, CTL, 156700106										
Sale	04/01/13	07/20/12	43.000	1,498.94	1,790.91	-291.97				
Sale	04/01/13	11/01/12	8.000	270.92	315 95	-45.03				
Subtotals				**1,769.86**	**2,106.86**					
CH ENERGY GROUP INC *EXCHANGED FOR CASH, 12541M102										
Merger	07/09/13	07/20/12	28.000	1,820.00	1,827.95(f)	-7.95				
Merger	07/09/13	04/01/13	7.000	455.00	465 72(f)	-10.72				
Subtotals				**2,275.00**	**2,293.67**					
CHESAPEAKE UTILS CORP, CPK, 165303108										
Sale	05/01/13	07/20/12	39.000	2,039.16	1,817.37	221.79				
Sale	05/01/13	12/03/12	3.000	157 46	145 72	11.74				
Subtotals				**2,196.62**	**1,963.09**					
CHUBB CORP, CB, 171232101										
Sale	04/01/13	07/20/12	25.000	2,177.00	1,772.70	404.30				
Sale	10/01/13	09/03/13	27 000	2,402.02	2,271.36	130.66				
Subtotals				**4,579.02**	**4,044.06**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

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Recipient ID No. **01-6220476**   Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO: 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
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(IRS Form 1099-B box numbers are shown below in **bold type**)

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Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
CNA FINL CORP, CNA, 126117100										
Sale	10/01/13	07/01/13	58.000	2,174.06	1,923.55	250.51				
Sale	10/01/13	07/02/13	18.000	666.75	605.69	61.06				
Subtotals				**2,840.81**	**2,529.24**					
CONAGRA FOODS INC, CAG, 205887102										
Sale	02/01/13	07/20/12	9.000	289.67	218.18	71.49				
CONOCOPHILLIPS, COP, 20825C104										
Sale	06/03/13	07/20/12	33.000	2,048.93	1,855.62	193.31				
Sale	06/03/13	05/01/13	7.000	426.67	428.02	-1.35				
Subtotals				**2,475.60**	**2,283.64**					
EQUITY LIFESTYLE PPTYS INC COM, ELS, 29472R108										
Sale	11/01/13	12/03/12	29.000	1,097.22	959.00	138.22				
ERIE INDTY CO CL A, ERIE, 29530P102										
Sale	01/02/13	07/20/12	7.000	476.99	502.50	-25 51				
Sale	05/01/13	07/20/12	19.000	1,503.06	1,363.93	139.13				
Sale	05/01/13	09/04/12	3.000	237.28	198.54	38.74				
Sale	05/01/13	11/01/12	2.000	150.30	132.32	17.98				
Sale	05/01/13	04/01/13	7.000	553 75	536.73	17.02				
Subtotals				**2,921.38**	**2,734.02**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **656-168997** Customer Service: 781-274-9300
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Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
EXELON CORP, EXC, 30161N101										
Sale	08/01/13	04/01/13	13 000	400 39	454.71	-54 32				
Sale	08/01/13	04/02/13	15 000	461 99	526.44	-64 45				
Sale	08/01/13	04/03/13	18.000	554.39	632.48	-78.09				
Sale	08/01/13	04/04/13	15 000	454.04	528.17	-74 13				
Sale	08/01/13	04/05/13	6.000	184.79	218.01	-33.22				
Subtotals				**2,055.60**	**2,359.81**					
FIRSTENERGY CORP, FE, 337932107										
Sale	11/01/13	04/01/13	13 000	495 55	554 47	-58.92				
Sale	11/01/13	08/01/13	17.000	648.02	658 20	-10.18				
Subtotals				**1,143.57**	**1,212.67**					
FLOWERS FOODS INC, FLO, 343498101										
Sale	01/02/13	07/20/12	28 000	658 15	576 26	81.89				
Sale	03/01/13	07/20/12	51.000	1,450.91	1,049 61	401 30				
Sale	03/01/13	09/04/12	9.000	248.09	193.89	54 20				
Sale	03/01/13	11/01/12	11.000	312 94	225.75	87.19				
Subtotals				**2,670.09**	**2,045.51**					
GENERAL DYNAMICS CRP, GD, 369550108										
Sale	05/01/13	07/20/12	28 000	2,057 84	1,827 11	230.73				
HCP INC COM, HCP, 40414L109										
Sale	08/01/13	03/01/13	41 000	1,717 29	2,010 07	-292 78				
Sale	08/01/13	06/03/13	5.000	210.39	247.93	-37 54				

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **656-168997** Customer Service: 781-274-9300
Recipient ID No **01-6220476** Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO 1545-0715

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8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
HCP INC COM, HCP, 40414L109										
Subtotals				**1,927.68**	**2,258.00**					
HEALTH CARE REIT INC, HCN, 42217K106										
Sale	12/02/13	02/01/13	31.000	1,728.21	1,910.65	-182.44				
Sale	12/02/13	08/01/13	11.000	605.28	699.53	-94.25				
Subtotals				**2,333.49**	**2,610.18**					
HEINZ H J CO, 423074103										
Sale	06/03/13	07/20/12	34.000	2,455.64	1,876.93	578.71				
HERSHEY CO, HSY, 427866108										
Sale	02/01/13	07/20/12	4.000	312.60	286.26	26.34				
Sale	03/01/13	07/20/12	22 000	1,827.90	1,574.45	253.45				
Sale	03/01/13	11/01/12	2 000	166.89	146.41	20.48				
Subtotals				**2,307.39**	**2,007.12**					
INTEL CORP, INTC, 458140100										
Sale	03/01/13	07/20/12	69.000	1,450.34	1,768.14	-317.80				
Sale	03/01/13	11/01/12	21.000	433.46	476.04	-42.58				
Subtotals				**1,883.80**	**2,244.18**					
KELLOGG COMPANY, K, 487836108										
Sale	02/01/13	07/20/12	5.000	285.29	239.27	46.02				

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LILLY ELI & CO, LLY, 532457108										
Sale	09/03/13	06/03/13	3.000	153.92	167.37	-13.45				
Sale	09/03/13	07/01/13	9.000	453.83	459 39	-5.56				
Subtotals				**607.75**	**626.76**					
LTC PPTYS INC, LTC, 502175102										
Sale	01/02/13	09/04/12	54.000	1,932.73	1,849 69	83.04				
Sale	01/02/13	11/01/12	5.000	171.00	174.90	-3.90				
Sale	08/01/13	03/01/13	32.000	1,189.31	1,250.87	-61.56				
Sale	08/01/13	07/01/13	12.000	448 97	479.37	-30 40				
Sale	08/02/13	03/01/13	19.000	706.21	742 71	-36 50				
Subtotals				**4,448.22**	**4,497.54**					
MATTEL INC, MAT, 577081102										
Sale	03/01/13	07/20/12	51.000	2,057.50	1,742.64	314 86				
MEDTRONIC INC, MDT, 585055106										
Sale	02/01/13	07/20/12	7.000	320.48	268.70	51.78				
Sale	05/01/13	07/20/12	35.000	1,632 71	1,343.50	289.21				
Sale	05/01/13	11/01/12	5.000	225.29	219 20	6 09				
Sale	05/01/13	04/01/13	9.000	419.84	429.15	-9.31				
Subtotals				**2,598.32**	**2,260.55**					
MERCURY GENERAL CORP, MCY, 589400100										
Sale	05/01/13	07/20/12	44.000	1,979.07	1,827.35	151.72				
Sale	05/01/13	09/04/12	3.000	134.93	122.06	12.87				

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Fidelity INVESTMENTS

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MERCURY GENERAL CORP, MCY, 589400100										
Sale	05/01/13	04/01/13	14.000	621.75	536.59	85.16				
Subtotals				**2,735.75**	**2,486.00**					
MICROSOFT CORP, MSFT, 594918104										
Sale	05/01/13	07/20/12	60 000	1,963.15	1,812.15	151.00				
Sale	05/01/13	11/01/12	8.000	253.80	244.19	9.61				
Subtotals				**2,216.95**	**2,056.34**					
MIDDLESEX WTR CO, MSEX, 596680108										
Sale	10/01/13	04/01/13	22.000	464.59	433.03	31.56				
NATIONAL HEALTH INVS INC, NHI, 63633D104										
Sale	05/01/13	02/01/13	30.000	1,941.86	1,936.35	5.51				
NATIONAL RETAIL PPTYS INC COM, NNN, 637417106										
Sale	11/01/13	10/01/13	31.000	1,059.36	1,029.39	29.97				
NV ENERGY INC COM, 67073Y106										
Sale	07/01/13	10/01/12	101.000	2,361.46	1,814.84	546 62				
ONEOK INC, OKE, 682680103										
Sale	07/01/13	07/20/12	40.000	1,630.42	1,769.63	-139.21				
Sale	07/01/13	05/01/13	8.000	327.67	390.91	-63.24				
Subtotals				**1,958.09**	**2,160.54**					

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OTTER TAIL CORP FORMERLY OTTER PWR CO TO, OTTR, 689648103										
Sale	02/01/13	07/20/12	11.000	292.78	261.45	31.33				
Sale	10/01/13	06/03/13	10 000	268 46	289.45	-20.99				
Subtotals				**561.24**	**550.90**					
PLUM CREEK TIMBER COINC, PCL, 729251108										
Sale	01/02/13	07/20/12	41.000	1,860.21	1,645.45	214 76				
Sale	01/02/13	11/01/12	3 000	129.38	134.79	-5 41				
Sale	11/01/13	07/01/13	53.000	2,430 00	2,452.31	-22.31				
Subtotals				**4,419.59**	**4,232.55**					
PRAXAIR INC, PX, 74005P104										
Sale	03/01/13	10/01/12	18.000	2,035.18	1,880.13	155.05				
PUBLIC STORAGE COM, PSA, 74460D109										
Sale	02/01/13	07/20/12	2 000	303.04	292.74	10.30				
QUESTAR CORP COM, STR, 748356102										
Sale	02/01/13	07/20/12	15.000	343 04	316.36	26.68				
RAYONIER INC, RYN, 754907103										
Sale	12/02/13	11/01/13	29.000	1,272.37	1,354 71	-82 34				
REALTY INCOME CORP (MARYLAND), O, 756109104										
Sale	10/01/13	11/01/12	5 000	203.24	201 95	1.29				
Sale	10/01/13	08/01/13	14 000	561.14	605.45	-44.31				
Subtotals				**764.38**	**807.40**					

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2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No **656-168997** Customer Service: 781-274-9300
Recipient ID No. **01-6220476** Payer's Fed ID Number: 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

8 Description, **1d** Stock or Other Symbol, CUSIP										
Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
RLI CORP, RLI, 749607107										
Sale	04/01/13	07/20/12	27.000	1,963.14	1,709.76	253.38				
Sale	04/01/13	12/03/12	2.000	138.19	134.30	3.89				
Sale	12/02/13	07/01/13	25.000	2,475.39	1,946.65	528.74				
Sale	12/02/13	07/02/13	7.000	685 15	550.67	134.48				
Subtotals				**5,261.87**	**4,341.38**					
ROCKVILLE FINL INC NEW COM, RCKB, 774188106										
Sale	07/01/13	07/20/12	48.000	628.26	569.26	59.00				
Sale	07/01/13	05/01/13	40.000	515.60	514.29	1.31				
Sale	07/02/13	07/20/12	39.000	502.71	462.53	40.18				
Sale	07/03/13	07/20/12	61.000	790.63	723.44	67.19				
Subtotals				**2,437.20**	**2,269.52**					
SENIOR HOUSING PROP TRUST, SNH, 81721M109										
Sale	11/01/13	03/01/13	79.000	1,953.63	1,975.12	-21.49				
Sale	11/01/13	07/01/13	16.000	387.72	418.25	-30.53				
Subtotals				**2,341.35**	**2,393.37**					
TIME WARNER INC NEW COM NEW, TWX, 887317303										
Sale	01/02/13	09/04/12	11.000	539.39	456.84	82.55				
Sale	03/01/13	09/04/12	29.000	1,546.99	1,204.39	342.60				
Sale	03/01/13	11/01/12	5.000	268 09	226.95	41.14				
Subtotals				**2,354.47**	**1,888.18**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN   Account No. **656-168997**   Customer Service 781-274-9300
Recipient ID No. **01-6220476**   Payer's Fed ID Number 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions**   Copy B for Recipient OMB NO. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
8 Description, **1d** Stock or Other Symbol, CUSIP										
UNITED PARCEL SVC INC CL B, UPS, 911312106										
Sale	02/01/13	07/20/12	3.000	231.95	236.39	-4 44				
UNIVERSAL CORP VA, UVV, 913456109										
Sale	03/01/13	08/01/12	36.000	1,986.65	1,616.71	369.94				
Sale	03/01/13	11/01/12	3.000	166.21	159.96	6.25				
Subtotals				**2,152.86**	**1,776.67**					
VENTAS INC, VTR, 92276F100										
Sale	10/01/13	03/01/13	28.000	1,767.04	2,003.23	-236.19				
Sale	10/01/13	06/03/13	3.000	181.37	222.27	-40 90				
Sale	10/01/13	08/01/13	10.000	631 08	655.15	-24 07				
Subtotals				**2,579.49**	**2,880.65**					
VORNADO RLTY TR, VNO, 929042109										
Sale	11/01/13	06/03/13	28.000	2,511.16	2,270 91	240.25				
WASTE MANAGEMENT INC, WM, 94106L109										
Sale	02/01/13	07/20/12	8.000	282.44	264 76	17.68				
WEIS MARKETS INC, WMK, 948849104										
Sale	07/01/13	07/20/12	41.000	1,865.26	1,773.82	91.44				
Sale	07/01/13	11/01/12	6 000	265.01	254.25	10.76				
Sale	07/01/13	05/01/13	11.000	500.44	459 72	40.72				
Subtotals				**2,630.71**	**2,487.79**					

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **656-168997** Customer Service: 781-274-9300
Recipient ID No. **01-6220476** Payer's Fed ID Number: 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO: 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
YORK WATER CO COM, YORW, 987184108										
Sale	09/04/13	11/01/12	10.000	191.44	180.28	11.16				
TOTALS				**129,396.71**	**120,534.87**			**0.00**		
		Box A Short-Term Realized Gain				**12,665.67**				
		Box A Short-Term Realized Loss				**-3,803.83**				
		Box A Wash Sale Loss Disallowed					**0.00**			

A-114 37.48

S/T Gains 8899.32

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **656-168997** Customer Service: 781-274-9300
Recipient ID No. **01-6220476** Payer's Fed ID Number: 04-3523567

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO: 1545-0715

Short-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box B checked and/or Schedule D, Part I
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

8 Description, 1d Stock or Other Symbol, CUSIP										
Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
AQUA AMERICA INC, WTR, 03836W103										
Cash In Lieu	09/06/13	09/06/13	0.000	12 19	0.00	12.19				
ARROW FINL CORP, AROW, 042744102										
Cash In Lieu	09/30/13	09/30/13	0 000	19.87	0.00	19.87				
COMMERCE BANCSHARES INC, CBSH, 200525103										
Cash In Lieu	12/17/13	12/17/13	0.000	2.21	0.00	2.21				
VECTOR GROUP LTD, VGR, 92240M108										
Cash In Lieu	09/30/13	09/30/13	0.000	3 21	0 00	3 21				
TOTALS				**37.48**	**0.00**			**0.00**		
		Box B Short-Term Realized Gain				**37.48**				
		Box B Short-Term Realized Loss				**0.00**				
		Box B Wash Sale Loss Disallowed					**0.00**			

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No **656-168997** Customer Service: 781•274-9300
Recipient ID No. **01-6220476** Payer's Fed ID Number 04-3523567

FORM 1099-B* **2013 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB NO. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes **1c** & **6**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
BROADRIDGE FINANCIAL SOLUTIONS LLC, BR, 11133T103										
Sale	10/01/13	08/01/12	78.000	2,512.96	1,628.75	884.21				
CARDINAL HEALTH INC, CAH, 14149Y108										
Sale	11/01/13	07/20/12	19.000	1,136.78	822.33	314.45				
Sale	12/02/13	07/20/12	25.000	1,615.47	1,082.02	533.45				
Subtotals				**2,752.25**	**1,904.35**					
FIRSTENERGY CORP, FE, 337932107										
Sale	11/01/13	07/20/12	38.000	1,440.58	1,922.01	-481.43				
Sale	11/01/13	09/04/12	4.000	152.47	181.91	-29.44				
Subtotals				**1,593.05**	**2,103.92**					
LILLY ELI & CO, LLY, 532457108										
Sale	09/03/13	07/20/12	38.000	1,949.74	1,685 49	264.25				
M D U RES GROUP INC, MDU, 552690109										
Sale	12/02/13	07/20/12	85.000	2,506 30	1,943.40	562.90				
MIDDLESEX WTR CO, MSEX, 596680108										
Sale	10/01/13	07/20/12	21.000	435.52	401.35	34.17				
Sale	10/02/13	07/20/12	37.000	771.71	707 14	64.57				
Sale	10/03/13	07/20/12	39.000	801.32	745.37	55.95				
Subtotals				**2,008.55**	**1,853.86**					
NATIONAL RETAIL PPTYS INC COM, NNN, 637417106										
Sale	11/01/13	07/20/12	61.000	2,100.19	1,778.74	321.45				

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Fidelity INVESTMENTS

2013 TAX REPORTING STATEMENT

ANNE/PAUL MARCUS FAMILY FNDTN Account No. **656-168997** Customer Service 781-274-9300
Recipient ID No. **01-6220476** Payer's Fed ID Number: 04-3523567

Copy B for Recipient OMB NO. 1545-0715

FORM 1099-B* 2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes **1c & 6**)

(IRS Form 1099-B box numbers are shown below in **bold type**)

8 Description, **1d** Stock or Other Symbol, CUSIP

Action	**1a** Date of Sale or Exchange	**1b** Date of Acquisition	**1e** Quantity Sold	**2a** Sales Price of Stocks, Bonds, etc. (a)	**3** Cost or Other Basis (b)	Gain/Loss (-)	**5** Wash Sale Loss Disallowed	**4 Federal Income Tax Withheld**	**13** State	**15** State Tax Withheld
NORTHROP GRUMMAN CORP HOLDING CO, NOC, 666807102										
Sale	09/03/13	07/20/12	7.000	644.01	455.24	188.77				
OTTER TAIL CORP FORMERLY OTTER PWR CO TO, OTTR, 689648103										
Sale	10/01/13	07/20/12	70.000	1,934.91	1,663.77	271.14				
RAYONIER INC, RYN, 754907103										
Sale	12/02/13	07/20/12	38.000	1,677.67	1,801.35	-123.68				
RAYTHEON CO COM NEW, RTN, 755111507										
Sale	09/03/13	07/20/12	10.000	748.93	563.51	185.42				
REALTY INCOME CORP (MARYLAND), O, 756109104										
Sale	10/01/13	07/20/12	44.000	1,788.56	1,796.96	-8.40				
YORK WATER CO COM, YORW, 987184108										
Sale	09/03/13	08/01/12	39.000	749 85	705 87	43.98				
Sale	09/04/13	08/01/12	63.000	1,198.18	1,140.26	57.92				
Subtotals				**1,948.03**	**1,846.13**					
3M COMPANY, MMM, 88579Y101										
Sale	12/02/13	07/20/12	21.000	2,673.28	1,897.74	775.54				
TOTALS				**26,838.43**	**22,923.21**			**0.00**		
	Box D Long-Term Realized Gain					**4,558.17**				
	Box D Long-Term Realized Loss					**-642.95**				
	Box D Wash Sale Loss Disallowed						**0.00**			
						3915.22				

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Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	POWER SHARES DB AGRI 1256 S/T PORTION			
b	POWER SHARES DB AGRI 1256 L/T PORTION			
c	US BRENT OIL FD 1256 S/T PORTION	P		
d	US BRENT OIL FD 1256 L/T PORTION	P		
e	POWER SHARES DB OIL FD 1256 S/T PORTION	P		
f	POWER SHARES DB OIL 1256 L/T PORTION	P		
g	POWER SHARES DB OIL S/T GAIN	P		
h	NATIONAL FINL SERVICES 2443	D		
i	NATIONAL FINL SERVICES 2443	D		
j	SPDR GOLD TR GOLD SHRS	P		
k	SPDR GOLD TR GOLD SHRS	P		
l	NATIONAL FINL SERVICES 8997 S/T TRANS	P		
m	NATIONAL FINL SERVICES 8997 S/T TRANS	P		
n	NATIONAL FINL SERVICES 8997 L/T TRANS	P		
o	CAPITAL GAINS DIVIDENDS			

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			2,618.	-2,618.
b			3,928.	-3,928.
c	766.			766.
d	1,148.			1,148.
e	762.			762.
f	1,143.			1,143.
g	1.			1.
h	126,305.		114,748.	11,557.
i	466,639.		358,258.	108,381.
j	3.		4.	-1.
k	312.		374.	-62.
l	129,397.		120,535.	8,862.
m	37.			37.
n	26,838.		22,923.	3,915.
o	968.			968.

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a				** -2,618.
b				-3,928.
c				** 766.
d				1,148.
e				** 762.
f				1,143.
g				** 1.
h				** 11,557.
i				108,381.
j				** -1.
k				-62.
l				** 8,862.
m				** 37.
n				3,915.
o				968.

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter "-0-" in Part I, line 7 }	2	130,931.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	19,366.

** (SHORT-TERM)

Part XV Supplementary Information

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 recipient	Purpose of grant or contribution	Amount
BRIDGE BOSTON FOUNDATION 2 MCLELLAN ST DORCHESTER, MA 02121	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
BRIGHAM AND WOMEN'S HOSPITAL 116 HUNTINGTON AVE, 3RD FLOOR BOSTON, MA 02116	NONE	PUBLIC CHARITY	UNRESTRICTED	2,000.
CAMP JABBERWOCKY PO BOX 1357 VINYARD HAVEN, MA 02568	NONE	PUBLIC CHARITY	UNRESTRICTED	3,500.
COMMON IMPACT 281 SUMMER ST, 5TH FLOOR BOSTON, MA 02210	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
CONCORD ACADEMY 166 MAIN STREET CONCORD, MA 01742	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
DANA FARBER MARATHON CHALLENGE 108 GOVERNOTS ROAD MILTON, MA 02186	NONE	PUBLIC CHARITY	UNRESTRICTED	250.
EMERALD NECKLACE CONSERVANCY 125 THE FENWAY BOSTON, MA 02115	NONE	PUBLIC CHARITY	UNRESTRICTED	2,625.
FAMILIES FIRST 99 BISHOP RICHARD ALLEN DRIVE CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	UNRESTRICTED	3,000.
FIRST PARISH IN BROOKLINE 382 WALNUT STREET BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
FROM THE TOP 295 HUNTINGTON AVENUE, SUITE 201 BOSTON, MA 02115	NONE	PUBLIC CHARITY	UNRESTRICTED	2,750.
Total from continuation sheets				417,310.

Part XV Supplementary Information

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 recipient	Purpose of grant or contribution	Amount
EXCEPTIONAL LIVES 77 HEATH STREET BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	UNRESTRICTED	90,000.
FRIENDS OF THE PERFORMING ARTS 163 BABCOCK STREET BROOKLINE, MA 02446	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
FULL FRAME INITIATIVE 308 MAIN STREET, SUITE 2A GREENFIELD, MA 01301	NONE	PUBLIC CHARITY	UNRESTRICTED UNRESTRICTED	1,500.
HOME FOR LITTLE WANDERERS 271 HUNTINGTON AVE BOSTON, MA 02115	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
HOSPICE OF THE GOOD SHEPHARD 90 WELLS AVE NEWTON CENTER, MA 02459	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
ISLAND DOLPHIN CARE 150 LORELANE PLACE KEY LARGO, FL 33037	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
LESLEY UNIVERSITY 29 EVERETT ST CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	THRESHOLD PROGRAM SPONSORSHIP	5,000.
LOVELANE SPECIAL NEEDS HORSEBACK 40 BAKER RIDGE RD LINCOLN, MA 01773	NONE	PUBLIC CHARITY	UNRESTRICTED	4,500.
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 77 MASSACHUSETTS AVE CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	NORMAN B LEVENTHAL, MARCUS FELLOWSHIP FUND	200,000.
MBHP 125 LINCOLN STREET BOSTON, MA 02111	NONE	PUBLIC CHARITY	UNRESTRICTED	1,000.
Total from continuation sheets				

Part XV Supplementary Information

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 recipient	Purpose of grant or contribution	Amount
MCGOVERN INSTITUTE FOR BRAIN RESEARCH AT MIT 43 VASSAR ST, MIT BLDG 46-3160 CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	UNRESTRICTED	1,500.
MIDDLEBRIDGE SCHOOL 333 OCEAN RD NARRAGANSETT, RI 02882	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
NEIGHBORHOOD CHARTER SCHOOL 21 QUEEN STREET DORCHESTER, MA 02122	NONE	PUBLIC CHARITY	UNRESTRICTED	500.
PAN MASS CHALLENGE 77 FOURTH AVE NEEDHAM, MA 02494	NONE	PUBLIC CHARITY	UNRESTRICTED	18,500.
PLATTSBURGH COLLEGE FOUNDTION, SUNY PLATTSBURGH 101 BROAD STREET PLATTSBURGY, NY 12901	NONE	STATE UNIVERSITY	ELEANOR MARCUS MUSIC ENDOWMENT	21,885.
RIVERSIDE COMMUNITY CARE 450 WASHINGTON ST DEDHAM, MA 02026	NONE	PUBLIC CHARITY	UNRESTRICTED	300.
SAVE THE CHILDREN 501 KINGS HWY E FAIRFILED, CT 06880	NONE	PUBLIC CHARITY	UNRESTRICTED	500.
ST CATHERINE GREEK ORTHODOX CHURCH 19 COMMON STREET BRAINTREE, MA 02184	NONE	PUBLIC CHARITY	UNRESTRICTED	500.
ST JOACHIM CHURCH 2 OAK STREET BEACON, NY 12508	NONE	PUBLIC CHARITY	UNRESTRICTED	1,000.
SUSAN F SMITH CENTER FOR WOMEN'S CANCERS,DANA-FARBER 10 BROOKLINE PLACE WEST 6TH FLOOR BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	UNSESTRICTED	1,500.
Total from continuation sheets				

Part XV Supplementary Information

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 recipient	Purpose of grant or contribution	Amount
THE CYSTIC FIBROSIS FOUNDATION 220 NORTH MAIN STREET, STE 104 NATICK, MA 01760	NONE	PUBLIC CHARITY	THE JOEY FUND	5,000.
THE PARK SCHOOL 171 GODDARD AVENUE BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	SUMMER AT THE PARK - 2013	6,000.
UNITED SOUTH END SETTLEMENTS 566 COLUMBUS AVE BOSTON, MA 02118	NONE	PUBLIC CHARITY	UNRESTRICTERD	3,000.
VSA MASSACHUSETTS, THE NONPROFIT CENTER 89 SOUTH STREET BOSTON, MA 02111	NONE	PUBLIC CHARITY	UNRESTRICTED	500.
YWCA BOSTON 140 CLARENDON ST, STE 403 BOSTON, MA 02116	NONE	PUBLIC CHARITY	UNRESTRECTED	500.
Total from continuation sheets				

Part XV **Supplementary Information**

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - AUTISIM CONSORTIUM

UNRESTRICTED

• If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box ▶ [X]

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

• If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1)

Part II | Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return See instructions	Name of exempt organization or other filer, see instructions ANNE AND PAUL MARCUS FAMILY FOUNDATION	Employer identification number (EIN) or 01-6220476
	Number, street, and room or suite no. If a P O box, see instructions. 260 FRANKLIN STREET, NO. 6TH FL	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions BOSTON, MA 02110	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

• The books are in the care of ▶ THE CORPORATION 260 FRANKLIN STREET, NO. 6TH FL - BOSTON, MA 02110

Telephone No ▶ 617 556 5200 Fax No. ▶

• If the organization does not have an office or place of business in the United States, check this box ▶ [ ]

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ If this is for the whole group, check this box ▶ [ ] If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until NOVEMBER 15, 2014.

5 For calendar year 2013 , or other tax year beginning ______ , and ending ______

6 If the tax year entered in line 5 is for less than 12 months, check reason. [ ] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension
AWAITING INFORMATION FROM THIRD PARTIES WHICH IS NEEDED TO PREPARE A COMPLETE AND ACURATE RETURN.

8a	If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	8a	$ 4,114.
b	If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	$ 4,114.
c	**Balance due.** Subtract line 8b from line 8a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	$ 0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶ Title ▶ Date ▶

323842
12-31-13