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Return of Private Foundation

OMB No 1545-0052

Department of the Treasury
Internal Revenue Service

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.

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

JUL 1, 2013

, and ending

JUN 30, 2014

Name of foundation

THE MARKS FAMILY FOUNDATION

A Employer identification number

16-1385716

Number and street (or P.O. box number if mail is not delivered to street address)

108 LEXINGTON AVENUE

Room/suite

B Telephone number

716-877-1618

City or town, state or province, country, and ZIP or foreign postal code

BUFFALO, NY 14222

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 changeD 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationF If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

I Fair market value of all assets at end of year

J Accounting method:

☒ Cash☐ Accrual

(from Part II, col (c), line 16)

☐ Other (specify)

\$ 2,381,054. (Part I, column (d) must be on cash basis)

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			N/A		
	2	Check ☒ if the foundation is not required to attach Sch. B					
	3	Interest on savings and temporary cash investments					
	4	Dividends and interest from securities	47,149.	47,149.		STATEMENT 1	
	5a	Gross rents					
	b	Net rental income or (loss)					
	6a	Net gain or (loss) from sale of assets not on line 10	58,684.				
	b	Gross sales price for all assets on line 6a	363,786.				
	7	Capital gain net income (from Part IV, line 2)		58,684.			
	8	Net short-term capital gain					
	9	Income modifications					
	10a	Gross sales less returns and allowances					
b	Less: Cost of goods sold						
c	Gross profit or (loss)						
11	Other income	44.	44.		STATEMENT 2		
12	Total. Add lines 1 through 11	105,877.	105,877.				
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0.	0.		0.	
	14	Other employee salaries and wages					
	15	Pension plans, employee benefits					
	16a	Legal fees					
	b	Accounting fees	STMT 3	2,500.	2,500.		0.
	c	Other professional fees	STMT 4	27,239.	27,239.		0.
	17	Interest					
	18	Taxes					
	19	Depreciation and depletion					
	20	Occupancy					
	21	Travel, conferences, and meetings					
	22	Printing and publications					
	23	Other expenses	STMT 5	3,553.	3,053.		500.
	24	Total operating and administrative expenses. Add lines 13 through 23		33,292.	32,792.		500.
	25	Contributions, gifts, grants paid		100,882.			100,882.
26	Total expenses and disbursements. Add lines 24 and 25		134,174.	32,792.		101,382.	
27	Subtract line 26 from line 12:						
a	Excess of revenue over expenses and disbursements		<28,297.>				
b	Net investment income (if negative, enter -0-)			73,085.			
c	Adjusted net income (if negative, enter -0-)			N/A			

gk 2

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		2,079.	3,144.	3,144.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	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				
	c	Investments - corporate bonds				
	Liabilities	11	Investments - land, buildings, and equipment, basis ▶			
		Less: accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other STMT 6	1,865,218.	1,837,856.	2,376,910.	
14		Land, buildings, and equipment, basis ▶ 6,000.				
		Less: accumulated depreciation STMT 7 ▶ 5,000.	3,000.	1,000.	1,000.	
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	1,870,297.	1,842,000.	2,381,054.	
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
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 ▶ ☒					
	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	1,870,297.	1,842,000.			
30	Total net assets or fund balances	1,870,297.	1,842,000.			
31	Total liabilities and net assets/fund balances	1,870,297.	1,842,000.			

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,870,297.
2	Enter amount from Part I, line 27a	2	<28,297.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,842,000.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,842,000.

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 MELLON INVESTMENTS	P	VARIOUS	VARIOUS
b Y MELLON INTERMEDIATE BD-M	P	VARIOUS	12/17/13
c BNY MELLON BOND FUND - M	P	VARIOUS	12/17/13
d DREYFUS EMG MKT DEBT LOC C-I	P	VARIOUS	12/31/13
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 361,759.		305,102.	56,657.
b 468.			468.
c 1,465.			1,465.
d 94.			94.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			56,657.
b			468.
c			1,465.
d			94.
e			

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	58,684.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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	100,411.	2,000,890.	.050183
2011	97,811.	2,039,516.	.047958
2010	93,755.	2,020,591.	.046400
2009	97,879.	1,852,429.	.052838
2008	126,543.	2,040,382.	.062019

2 Total of line 1, column (d)	2	.259398
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	.051880
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	2,209,427.
5 Multiply line 4 by line 3	5	114,625.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	731.
7 Add lines 5 and 6	7	115,356.
8 Enter qualifying distributions from Part XII, line 4	8	101,382.

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	1,462.
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	1,462.
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	1,462.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,463.	
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	2,463.	
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	1,001.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ 1,001. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation 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? Website address ► N/A	13	X	
14	The books are in care of ► DEBBIE KULL Located at ► 108 LEXINGTON AVENUE, BUFFALO, NY Telephone no. ► 716-877-1618 ZIP+4 ► 14222			
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			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► N/A	1b	
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

6b

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

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

7b

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

N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 8		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

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 THIS FOUNDATION IS SOLELY ENGAGED IN CHARITABLE GIVING AND DOES NOT CONDUCT ANY DIRECT CHARITABLE ACTIVITIES OR MAKE PROGRAM RELATED INVESTMENTS	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

	Amount
1 SAME AS PART IX-A	0.
2	
3 All other program-related investments. See instructions.	

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	2,240,462.	
b Average of monthly cash balances	1b	2,611.	
c Fair market value of all other assets	1c		
d Total (add lines 1a, b, and c)	1d	2,243,073.	
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	2,243,073.	
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	33,646.	
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,209,427.	
6 Minimum investment return. Enter 5% of line 5	6	110,471.	

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

1 Minimum investment return from Part X, line 6	1	110,471.
2a Tax on investment income for 2013 from Part VI, line 5	2a	1,462.
b Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	1,462.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	109,009.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	109,009.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	109,009.

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	101,382.
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 Surtability 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	101,382.
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	101,382.

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.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				109,009.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			99,440.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 101,382.				
a Applied to 2012, but not more than line 2a			99,440.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2013 distributable amount				1,942.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				107,067.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
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 XV Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AKAG - R.A. MARKS FUND	NONE	PUBLIC	GENERAL CHARITABLE USE	100.
BIG BROTHERS BIG SISTERS OF ERIE COUNTY	NONE	PUBLIC	GENERAL CHARITABLE USE	7,500.
BOSTON UNIVERSITY	NONE	PUBLIC	GENERAL CHARITABLE USE	500.
BOYS & GIRLS CLUB OF THE NORTHTOWNS	NONE	PUBLIC	GENERAL CHARITABLE USE	10,000.
BUFFALO ZOO	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
Total SEE CONTINUATION SHEET(S)				100,882.
b Approved for future payment				
NONE				
Total				0.

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash			X
(2) Other assets			X
b Other transactions.			
(1) Sales of assets to a noncharitable exempt organization			X
(2) Purchases of assets from a noncharitable exempt organization			X
(3) Rental of facilities, equipment, or other assets			X
(4) Reimbursement arrangements			X
(5) Loans or loan guarantees			X
(6) Performance of services or membership or fundraising solicitations			X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees		1c	X
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

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

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge				May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No	
	Signature of officer or trustee <i>Subin C. Muth</i>		Date <i>11 Nov 2014</i>	Title <i>Executive Director</i>		
Paid Preparer Use Only	Print/Type preparer's name DAVID R. BARRETT		Preparer's signature <i>David R. Barrett, CPA</i>	Date <i>11/10/14</i>	Check ☐ if self-employed	PTIN P00055875
	Firm's name ► FREED MAXICK CPAS, P.C.				Firm's EIN ► 45-4051133	
	Firm's address ► 424 MAIN STREET, SUITE 800 BUFFALO, NY 14202-3508				Phone no. 716-847-2651	

Activity detail

Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
07/01/2013	Beginning balances	\$ 16,782.38	\$ -103.18	\$ 1,865,218.91	
Receipts					
Sales and maturities					
Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
10/08/2013	Sold 774 Units Of BNY Mellon Corp Bond-M Trade Date 10/7/13 Theor Settlement Date 10/8/13 Taxable To Federal And State 774 Units At \$12.60	\$ 9,752.40		\$ -9,613.08	\$ 139.32
02/03/2014	Sold 1,412.329 Units Of Dreyfus Emg Mkt Debt Loc C-I Trade Date 1/31/14 Theor Settlement Date 2/3/14 Taxable To Federal And State 1,412.329 Units At \$13.11	18,515.63		-20,183.89	-1,668.26
05/12/2014	Sold 964.506 Units Of BNY Mellon Bond Fund-M Trade Date 5/9/14 Theor Settlement Date 5/12/14 Taxable To Federal And State 964.506 Units At \$12.96	12,500.00		-13,069.05	-569.05
05/12/2014	Sold 783.085 Units Of BNY Mellon Intermediate Bd-M Trade Date 5/9/14 Theor Settlement Date 5/12/14 Taxable To Federal And State 783.085 Units At \$12.77	10,000.00		-10,321.06	-321.06
05/13/2014	Sold 612.662 Units Of Advantage Dynamic Total Return Trade Date 5/12/14 Theor Settlement Date 5/13/14 Taxable To Federal And State 612.662 Units At \$14.69	9,000.00		-7,842.08	1,157.92
05/13/2014	Sold 686.948 Units Of ASG Managed Futures Strat-Y Trade Date 5/12/14 Theor Settlement Date 5/13/14 Taxable To Federal And State 686.948 Units At \$10.19	7,000.00		-6,622.54	377.46
05/14/2014	Sold 1,055 Shares Of iSHARES MSCI Emerging Markets ETF Trade Date 5/9/14 Theor Settlement Date 5/14/14 Sold Through Sei Financial Services Co Paid \$42.20 Brokerage Paid \$0.97 Sec Fee Sold On The Otc Bulletin Board Taxable To Federal And State 1,055 Shares At \$41.6333	43,879.96		-46,960.11	-3,080.15



Receipts

Sales and maturities
continued

Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
05/14/2014	Sold 391 Shares Of ISHARES Core S&P Small-Cap ETF Trade Date 5/9/14 Theor. Settlement Date 5/14/14 Sold Through Ser Financial Services Co Paid \$15.64 Brokerage Paid \$0.91 Sec Fee Sold On The Otc Bulletin Board Taxable To Federal And State 391 Shares At \$104.9301	41,011.12		-29,184.20	11,826.92
05/14/2014	Sold 640 Shares Of SPDR S&P 500 ETF Trust Trade Date 5/9/14 Theor Settlement Date 5/14/14 Sold Through Ser Financial Services Co Paid \$25.60 Brokerage Paid \$2.65 Sec Fee Sold On The Otc Bulletin Board Taxable To Federal And State 640 Shares At \$187.3401	119,869.41		-91,386.14	28,483.27
06/13/2014	Sold 918.964 Units Of BNY Mellon S/T US Gov Secs-M Trade Date 6/12/14 Theor Settlement Date 6/13/14 Taxable To Federal And State 918.964 Units At \$11.97	11,000.00		-11,303.26	-303.26
06/13/2014	Sold 31.621 Units Of Dreyfus Floating Rate Inc-I Trade Date 6/12/14 Theor Settlement Date 6/13/14 Taxable To Federal And State 31.621 Units At \$12.65	400.00		-399.06	0.94
06/13/2014	Sold 17.73 Units Of ASG Global Alternatives Fund-Y Trade Date 6/12/14 Theor Settlement Date 6/13/14 Taxable To Federal And State 17.73 Units At \$11.28	200.00		-194.85	5.15
06/17/2014	Sold 191 Shares Of ISHARES Core S&P Small-Cap ETF Trade Date 6/12/14 Theor. Settlement Date 6/17/14 Sold Through Ser Financial Services Co Paid \$7.64 Brokerage Paid \$0.46 Sec Fee Sold On The Otc Bulletin Board Taxable To Federal And State 191 Shares At \$109.5284	20,911.82		-14,256.22	6,655.60
06/17/2014	Sold 255 Shares Of SPDR S&P 500 ETF Trust Trade Date 6/12/14 Theor. Settlement Date 6/17/14 Sold Through Ser Financial Services Co Paid \$10.20 Brokerage Paid \$1.10 Sec Fee Sold On The Otc Bulletin Board Taxable To Federal And State 255 Shares At \$194.6201	49,616.83		-35,883.58	13,733.25



Receipts

Sales and maturities continued

Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
06/17/2014	Sold 185 Shares Of ISHARES MSCI Emerging Markets ETF Trade Date 6/12/14 Theor Settlement Date 6/17/14 Sold Through Sei Financial Services Co Paid \$7.40 Brokerage Paid \$0.18 Sec Fee Sold On The Otc Bulletin Board Taxable To Federal And State 185 Shares At \$43.835	8,101.90		-7,882.83	219.07
Total sales and maturities		\$ 361,759.07	\$ 0.00	\$ -305,101.95	\$ 56,657.12

Receipts

Dividends

Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
07/01/2013	Cash Receipt Of Dividend Earned On BNY Mellon Bond Fund-M \$0.03/Unit On 8,139,522 Units Due 6/28/13		\$ 244.19		
07/01/2013	Cash Receipt Of Dividend Earned On Tcw Emerging Markets Income Fund-I \$0.045/Unit On 2,740,914 Units Due 6/28/13		123.34		
07/01/2013	Cash Receipt Of Dividend Earned On BNY Mellon Corp Bond-M \$0.031/Unit On 3,097,182 Units Due 6/28/13		96.01		
07/01/2013	Cash Receipt Of Dividend Earned On BNY Mellon S/T US Gov Secs-M \$0.012/Unit On 2,015,399 Units Due 6/28/13		24.18		
07/01/2013	Cash Receipt Of Dividend Earned On BNY Mellon Intermediate Bd-M \$0.021/Unit On 5,423,618 Units Due 6/28/13		113.90		
07/01/2013	Cash Receipt Of Dividend Earned On Dreyfus High Yield-I Dividend From 6/1/13 To 6/30/13		163.82		
07/02/2013	Cash Receipt Of Dividend Earned On ISHARES Core S&P Mid-Cap ETF \$0.444237/Share On 1,260 Shares Due 7/2/13		559.74		



July 1, 2013 - June 30, 2014

Marks Family Foundation-IMA
Account number 10226743AR0

Page 28 of 35.

Receipts

Transfers-receipts (within account) continued

Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
12/02/2013	Cash Receipt Transfer From Income Net Income	852 25			
12/31/2013	Cash Receipt Transfer From Income Net Income	6,162 38			
02/28/2014	Cash Receipt Transfer From Income Net Income	168 41			
03/31/2014	Cash Receipt Transfer From Income Net Income	776 49			
06/02/2014	Cash Receipt Transfer From Income Net Income	745 69			
06/30/2014	Cash Receipt Transfer From Income Net Income	975 41			
Total transfers-receipts (within account)		\$ 18,686 17	\$ 0 00	\$ 0 00	\$ 0 00

Receipts

Other receipts

Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
09/24/2013	Cash Receipt Class Action Proceeds Net Of Expenses Cit Group Inc (2008) Class Period 12/12/06 - 3/5/08 Cusip 125577106	\$ 28 69			
12/17/2013	Receive ST Capital Gains Distribution On BNY Mellon Corp Bond-M \$0.0031/Unit On 2,323,182 Units Due 12/16/13 ST Capital Gain Of \$7 20 On Federal Cost ST Capital Gain Of \$7 20 On State Cost	7 20			7 20



Receipts

Other receipts
continued

Date	Transaction description	Principal cash	Income cash	Tax cost	Gain/loss
12/17/2013	Receive Lt Capital Gains Distribution On BNY Mellon Intermediate Bd-M \$0 0863/Unit On 5,423 618 Units Due 12/16/13 Lt Capital Gain Of \$468 06 On Federal Cost Lt Capital Gain Of \$468 06 On State Cost	468 06			468 06
12/17/2013	Receive Lt Capital Gains Distribution On BNY Mellon Bond Fund-M \$0 18/Unit On 8,139 522 Units Due 12/16/13 Lt Capital Gain Of \$1,465.11 On Federal Cost Lt Capital Gain Of \$1,465 11 On State Cost	1,465 11			1,465 11
12/31/2013	Receive Lt Capital Gains Distribution On Dreyfus Emg Mkt Debt Loc C-I \$0,0668/Unit On 1,405 569 Units Due 12/30/13 Lt Capital Gain Of \$93 89 On Federal Cost Lt Capital Gain Of \$93 89 On State Cost	93 89			93 89
01/13/2014	Reversal Affil Mutual Fund Cap By BNY Mellon		-108.81		
02/18/2014	Cash Receipt Affil Mutual Fund Cap By BNY Mellon		108.81		
03/25/2014	Cash Receipt Class Action Proceeds Net Of Expenses Wachovia Preferred Securities Cusip Unknown Cp 1ST Offering - Ipo 2/27/09	14 83			
04/09/2014	Receive ST Capital Gains Distribution On ASG Managed Futures Strat-Y \$0 0949/Unit On 2,694 704 Units Due 4/9/14 ST Capital Gain Of \$255 73 On Federal Cost ST Capital Gain Of \$255.73 On State Cost	255 73			255 73
06/18/2014	Reversal Affil Mutual Fund Cap By BNY Mellon		-7 05		
Total other receipts		\$ 2,333 51	\$ -7 05	\$ 0 00	\$ 2,289.99
Total receipts		\$ 382,778.75	\$ 48,126 44	\$ -305,101.95	\$ 58,947 11

BNY MELLON
WEALTH MANAGEMENT

Portfolio manager

Paul K Wojcik
814 874 5207

Page 29 of 35

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MELLON	46,886.	0.	46,886.	46,886.	
MELLON	263.	0.	263.	263.	
TO PART I, LINE 4	47,149.	0.	47,149.	47,149.	

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISCELLANEOUS	44.	44.	
TOTAL TO FORM 990-PF, PART I, LINE 11	44.	44.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	2,500.	2,500.		0.
TO FORM 990-PF, PG 1, LN 16B	2,500.	2,500.		0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	27,239.	27,239.		0.
TO FORM 990-PF, PG 1, LN 16C	27,239.	27,239.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS	803.	803.		0.
STATE FILING FEE	250.	250.		0.
BOARD EXPENSES	500.	0.		500.
AMORTIZATION	2,000.	2,000.		0.
TO FORM 990-PF, PG 1, LN 23	3,553.	3,053.		500.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MELLON #3AR0	COST	1,837,856.	2,376,910.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,837,856.	2,376,910.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	7
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
WEBSITE DEVELOPMENT	6,000.	5,000.	1,000.
TOTAL TO FM 990-PF, PART II, LN 14	6,000.	5,000.	1,000.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	8
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
THEODORE E. MARKS 108 LEXINGTON AVE. BUFFALO, NY 14222	TRUSTEE 0.50	0.	0.	0.
JOSHUA R. MARKS 679 DEGRAW STREET, APT. 1 BROOKLYN, NY 11217	TRUSTEE 0.50	0.	0.	0.
SALLY MARKS 6 LACOSTA WAY PALM BEACH, FL 33480	TRUSTEE 0.50	0.	0.	0.
WENDELYN W. DUQUETTE RR#1, 1890 GREG HILL RD WATERBURY, CT	TRUSTEE 0.50	0.	0.	0.
HEATHER A. MARKS 107 GOLDBROOK CIRCLE STOWE, VT 05672	TRUSTEE 0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	9
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NAME OF MANAGER

THEODORE E. MARKS
JOSHUA R. MARKS
WENDELYN W. DUQUETTE
HEATHER A. MARKS

FD-066

[illegible]

328102
05-01-13

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

Depreciation and Amortization 990-PF
 (Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

2013

Attachment
 Sequence No **179**

THE MARKS FAMILY FOUNDATION

FORM 990-PF PAGE 1

16-1385716

Part I Election To Expense Certain Property Under Section 179 Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	2,000,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2012 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2014. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property) (See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2013	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2013 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property	/		27.5 yrs.	MM	S/L	
	/		27.5 yrs.	MM	S/L	
i Nonresidential real property	/		39 yrs.	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2013 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year	/		40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.	22	0.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)
Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No				24b If "Yes," is the evidence written? ☐ Yes ☐ No				
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use							25	
26 Property used more than 50% in a qualified business use:								
		%						
		%						
		%						
27 Property used 50% or less in a qualified business use:								
		%				S/L -		
		%				S/L -		
		%				S/L -		
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1							28	
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1								29

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle	(b) Vehicle	(c) Vehicle	(d) Vehicle	(e) Vehicle	(f) Vehicle
30 Total business/investment miles driven during the year (do not include commuting miles)						
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year. Add lines 30 through 32						
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?						
36 Is another vehicle available for personal use?						

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year	
42 Amortization of costs that begins during your 2013 tax year:						
43 Amortization of costs that began before your 2013 tax year					43	2,000.
44 Total. Add amounts in column (f). See the instructions for where to report					44	2,000.

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
CENTRAL VERMONT ADULT BASIC EDUCATION	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
COLONIAL WILLIAMSBURG FOUNDATION	NONE	PUBLIC	GENERAL CHARITABLE USE	50.
COMMUNITY FOUNDATION FOR GREATER BUFFALO	NONE	PUBLIC	GENERAL CHARITABLE USE	10,000.
COUDERT INSTITUTE	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
FAMILY CENTER OF WASHINGTON COUNTY	NONE	PUBLIC	GENERAL CHARITABLE USE	6,000.
FRIENDS OF MOUNTS BOTANICAL GARDEN	NONE	PUBLIC	GENERAL CHARITABLE USE	600.
HOLY TRINITY LUTHERAN CHURCH	NONE	PUBLIC	GENERAL CHARITABLE USE	1,109.
HOSPICE FOUNDATION	NONE	PUBLIC	GENERAL CHARITABLE USE	12,600.
INTERNATIONAL INSTITUTE OF BUFFALO	NONE	PUBLIC	GENERAL CHARITABLE USE	1,000.
LITERACY NEW YORK - BUFFALO NIAGARA	NONE	PUBLIC	GENERAL CHARITABLE USE	5,000.
Total from continuation sheets				82,532.

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
LIVE LIGHT LIVE RIGHT	NONE	PUBLIC	GENERAL CHARITABLE USE	7,500.
MEALS ON WHEELS	NONE	PUBLIC	GENERAL CHARITABLE USE	3,500.
METROPOLITAN OPERA NATIONAL COUNCIL AD	NONE	PUBLIC	GENERAL CHARITABLE USE	100.
NICHOLS SCHOOL	NONE	PUBLIC	GENERAL CHARITABLE USE	200.
PARK SCHOOL OF BUFFALO	NONE	PUBLIC	GENERAL CHARITABLE USE	8,833.
PARSONS THE NEW SCHOOL FOR DESIGN	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
SALVATION ARMY	NONE	PUBLIC	GENERAL CHARITABLE USE	5,000.
SEA EDUCATION	NONE	PUBLIC	GENERAL CHARITABLE USE	500.
SQUEAKY WHEEL	NONE	PUBLIC	GENERAL CHARITABLE USE	15,240.
ST JOHNS IN THE MOUNTAINS	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
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
SUNY GENESEO	NONE	PUBLIC	GENERAL CHARITABLE USE	300.
SUPREME COUNCIL 33	NONE	PUBLIC	GENERAL CHARITABLE USE	1,000.
UNIVERSITY OF VERMONT	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
VERMONT FOOD BANK	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
VERMONT PUBLIC RADIO	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
VERMONT WOMEN'S FUND	NONE	PUBLIC	GENERAL CHARITABLE USE	250.
WALNUT HILL SCHOOL	NONE	PUBLIC	GENERAL CHARITABLE USE	500.
WNY WOMENS FUND	NONE	PUBLIC	GENERAL CHARITABLE USE	1,500.
Total from continuation sheets				