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Return of Private Foundation

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

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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 NOV 1, 2013, and ending OCT 31, 2014

Name of foundation THE NANCY LURIE MARKS FAMILY FOUNDATION		A Employer identification number 04-2607232
Number and street (or P O box number if mail is not delivered to street address) 60 WILLIAM STREET, SUITE 110	Room/suite	B Telephone number 617-482-1776
City or town, state or province, country, and ZIP or foreign postal code WELLESLEY, MA 02481		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 122,469,118.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		700,758.	676,481.		STATEMENT 2
4 Dividends and interest from securities		1,255,597.	1,254,817.		STATEMENT 3
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		7,702,288.			STATEMENT 1
b Gross sales price for all assets on line 6a		7,702,288.			
7 Capital gain net income (from Part IV, line 2)			7,657,353.		
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		463,755.	432,022.		STATEMENT 4
12 Total. Add lines 1 through 11		10,122,398.	10,020,673.		
13 Compensation of officers, directors, trustees, etc		716,983.	0.		488,947.
14 Other employee salaries and wages		246,843.	0.		474,880.
15 Pension plans, employee benefits		60,301.	0.		60,301.
16a Legal fees STMT 5		25,782.	25,782.		0.
b Accounting fees STMT 6		41,600.	0.		41,600.
c Other professional fees STMT 7		1,174,445.	1,166,958.		0.
17 Interest					
18 Taxes STMT 8		303,083.	52,196.		0.
19 Depreciation and depletion		13,600.	0.		
20 Occupancy		145,064.	0.		145,064.
21 Travel, conferences, and meetings		27,571.	0.		27,571.
22 Printing and publications					
23 Other expenses STMT 9		160,915.	0.		160,915.
24 Total operating and administrative expenses. Add lines 13 through 23		2,916,187.	1,244,936.		1,399,278.
25 Contributions, gifts, grants paid		4,644,057.			4,644,057.
26 Total expenses and disbursements. Add lines 24 and 25		7,560,244.	1,244,936.		6,043,335.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		2,562,154.			
b Net investment income (if negative, enter -0-)			8,775,737.		
c Adjusted net income (if negative, enter -0-)				N/A	

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	1,674,394.	6,666,399.	6,666,399.
	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 STMT 11	93,715,775.	90,552,524.	115,787,904.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Liabilities	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ 719,959.			
	Less: accumulated depreciation STMT 12 ▶ 705,144.	18,354.	14,815.	14,815.
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	95,408,523.	97,233,738.	122,469,118.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	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.	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
Net Assets or Fund Balances	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 ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	95,408,523.	97,233,738.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Net Assets or Fund Balances	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 Total net assets or fund balances	95,408,523.	97,233,738.	
	31 Total liabilities and net assets/fund balances	95,408,523.	97,233,738.	

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	95,408,523.
2 Enter amount from Part I, line 27a	2	2,562,154.
3 Other increases not included in line 2 (itemize) ▶ RETURNED CONTRIBUTIONS	3	12,820.
4 Add lines 1, 2, and 3	4	97,983,497.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 10	5	749,759.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	97,233,738.

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 K-1S	P	VARIOUS	VARIOUS
b OTHER ENTITY	P	VARIOUS	VARIOUS
c OFFSHORE	P	VARIOUS	VARIOUS
d CHESTNUT HEDGE FUND	P	VARIOUS	VARIOUS
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 4,144,089.		44,935.	4,099,154.
b 846,998.			846,998.
c 2,521,676.			2,521,676.
d 189,525.			189,525.
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			4,099,154.
b			846,998.
c			2,521,676.
d			189,525.
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	7,657,353.
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	5,274,662.	108,541,451.	.048596
2011	3,889,509.	100,366,605.	.038753
2010	4,702,827.	101,928,150.	.046139
2009	4,290,744.	94,423,137.	.045442
2008	4,786,264.	85,133,365.	.056221

2 Total of line 1, column (d)	2	.235151
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	.047030
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	118,808,075.
5 Multiply line 4 by line 3	5	5,587,544.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	87,757.
7 Add lines 5 and 6	7	5,675,301.
8 Enter qualifying distributions from Part XII, line 4	8	6,743,335.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	87,757.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
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	87,757.
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	87,757.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	153,869.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	50,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	203,869.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	116,112.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> 116,112. Refunded <input type="checkbox"/>	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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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?	4b	X
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) <input checked="" type="checkbox"/> 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	10	X

Form 990-PF (2013)

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 ► GOULSTON & STORRS Located at ► 400 ATLANTIC AVE. BOSTON, MA	Telephone no. ► 617-482-1776 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			
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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

Form 990-PF (2013)

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13		716,984.	8,303.	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
ELEONORA SILAYEVA - C/O NLM FOUNDATION, 60 WILLIAMS ST,	EXECUTIVE ASSOCIATE FOR ADMINISTRATION	93,100.	26,361.	0.
JUDITH CHAN - C/O NLM FOUNDATION, 60 WILLIAMS ST, WELLESLEY, MA	RESEARCH ANALYST	80,608.	25,637.	0.

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

0

Form 990-PF (2013)

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
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET, BOSTON, MA 02110	INVESTMENT ADVISORY FEES	197,755.
GOULSTON & STORRS 400 ATLANTIC AVE, BOSTON, MA 02110	CUSTODIAL & LEGAL FEES	145,285.
KENNETH M. FARBER - C/O NLM FOUNDATION, 60 WILLIAMS ST, WELLESLEY, MA	CONSULTING	82,613.
DELOITTE TAX LLP 200 BERKELEY STREET, BOSTON, MA 02116	ACCOUNTING	44,696.
TUKMAN GROSSMAN CAPITAL MANAGEMENT - 60 EAST SIR FRANCIS DRAKE BLVD SUITE 204, LARKSPUR	INVESTMENT ADVISOR	38,541.
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 NOT APPLICABLE	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 INVESTMENT IN STEMINA BIOMARKER DISCOVERY, INC. TO PARTIALLY FUND SCIENTIFIC RESEARCH ON AUTISM DONE BY THE COMPANY.	700,000.
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	700,000.

Form 990-PF (2013)

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	114,529,972.
b	Average of monthly cash balances	1b	6,087,363.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	120,617,335.
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	120,617,335.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,809,260.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	118,808,075.
6	Minimum investment return. Enter 5% of line 5	6	5,940,404.

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	5,940,404.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	87,757.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	19,950.
c	Add lines 2a and 2b	2c	107,707.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	5,832,697.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	5,832,697.
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	5,832,697.

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	6,043,335.
b	Program-related investments - total from Part IX-B	1b	700,000.
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	6,743,335.
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	87,757.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,655,578.

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.

Form 990-PF (2013)

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				5,832,697.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			91,926.	
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: ▶ \$ 6,743,335.				
a Applied to 2012, but not more than line 2a			91,926.	
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				5,832,697.
e Remaining amount distributed out of corpus	818,712.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	818,712.			
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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	818,712.			
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	818,712.			

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				
SEE ATTACHED SCHEDULE	NONE	PUBLIC CHARITY	SEE ATTACHED SCHEDULE	4,644,057.
Total			3a	4,644,057.
b Approved for future payment				
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	379,103.
BRADLEY HOSPITAL 1011 VETERANS MEMORIAL PARKWAY EAST PROVIDENCE, RI 02915	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	144,000.
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453	NONE	PUBLIC CHARITY	EDUCATION	400,000.
Total			3b	3,197,360.
SEE CONTINUATION SHEET(S)				

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.		



[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

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

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.

Sign Here

Signature of officer or trustee
Date
Title

☒ Yes
 ☐ No

May the IRS discuss this return with the preparer shown below (see instr. 1)?

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature <i>Diana Cohen</i>	Date 07/20/2015	Check <input type="checkbox"/> if self-employed	PTIN P00188391
	Firm's name ▶ DELOITTE TAX LLP			Firm's EIN ▶ 86-1065772	
	Firm's address ▶ 200 BERKELEY STREET BOSTON, MA 02116			Phone no. 617-437-2000	

Part XV Supplementary Information

3 Grants and Contributions Approved for Future Payment (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
HARVARD MEDICAL SCHOOL 25 SHATTUCK ST BOSTON, RI 02115	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	476,210.
MINNESOTA AUTISM CENTER 5710 BAKER ROAD MINNETONKA, MN 55345	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	140,000.
MAINE MEDICAL CENTER 22 BRAMHALL STREET PORTLAND, ME 04102	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	154,959.
MASSACHUSETTS GENERAL HOSPITAL 55 FRUIT STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	340,299.
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 77 MASSACHUSETTS AVENUE CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	566,789.
RUTGERS UNIVERSITY 57 US HIGHWAY 1 NEW BRUNSWICK, NJ 08901	NONE	PUBLIC CHARITY	EDUCATION	521,000.
TUFTS UNIVERSITY 419 BOSTON AVENUE MEDFORD, MA 02155	NONE	PUBLIC CHARITY	EDUCATION	75,000.
Total from continuation sheets				2,274,257.

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

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED PURCHASED	(F) DATE ACQUIRED VARIOUS	DATE SOLD VARIOUS
K-1S	4,144,089.	0.	0.	0.	0.	4,144,089.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED PURCHASED	(F) DATE ACQUIRED VARIOUS	DATE SOLD VARIOUS
OTHER ENTITY	846,998.	0.	0.	0.	0.	846,998.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED PURCHASED	(F) DATE ACQUIRED VARIOUS	DATE SOLD VARIOUS
OFFSHORE	2,521,676.	0.	0.	0.	0.	2,521,676.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED PURCHASED	DATE ACQUIRED VARIOUS	DATE SOLD VARIOUS
CHESTNUT HEDGE FUND	189,525.	0.	0.			

CAPITAL GAINS DIVIDENDS FROM PART IV 0.

TOTAL TO FORM 990-PF, PART I, LINE 6A 7,702,288.

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
CHESTNUT HEDGE FUND	953.	953.	
FIDELITY	122.	122.	
TOTAL INTEREST FROM K-1S	699,683.	675,406.	
TOTAL TO PART I, LINE 3	700,758.	676,481.	

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
CHESTNUT HEDGE FUND	17,216.	0.	17,216.	17,216.	
TOTAL DIVIDENDS FROM K-1S	960,000.	0.	960,000.	959,220.	
TOTAL DIVIDENDS FROM OTHER ENTITIES	278,381.	0.	278,381.	278,381.	
TO PART I, LINE 4	1,255,597.	0.	1,255,597.	1,254,817.	

FORM 990-PF	OTHER INCOME		STATEMENT	4
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
OTHER INCOME FROM K-1S CHESTNUT HEDGE FUND	467,233. <3,478.>	435,500. <3,478.>		
TOTAL TO FORM 990-PF, PART I, LINE 11	463,755.	432,022.		

FORM 990-PF	LEGAL FEES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GOULSTON & STORRS	25,782.	25,782.		0.
TO FM 990-PF, PG 1, LN 16A	25,782.	25,782.		0.

FORM 990-PF	ACCOUNTING FEES		STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DELOITTE TAX LLP	41,600.	0.		41,600.
TO FORM 990-PF, PG 1, LN 16B	41,600.	0.		41,600.

FORM 990-PF	OTHER PROFESSIONAL FEES		STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
K-1S	780,701.	773,214.		0.
CHESTNUT HEDGE FUND	23,211.	23,211.		0.
OTHER ENTITY	370,533.	370,533.		0.
TO FORM 990-PF, PG 1, LN 16C	1,174,445.	1,166,958.		0.

FORM 990-PF	TAXES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL TAXES PAID	250,271.	0.		0.	
FOREIGN TAXES PAID	52,196.	52,196.		0.	
MA PC FEE	616.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	303,083.	52,196.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CONSULTING	107,861.	0.		107,861.	
BOOKS & SUBSCRIPTIONS	3,849.	0.		3,849.	
MAIL	557.	0.		557.	
OFFICE EXPENSES	12,219.	0.		12,219.	
PROGRAM DEVELOPMENT	5,833.	0.		5,833.	
UTILITIES	13,759.	0.		13,759.	
INSURANCE	16,837.	0.		16,837.	
TO FORM 990-PF, PG 1, LN 23	160,915.	0.		160,915.	

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	10
DESCRIPTION					AMOUNT
ADJUSTMENT TO CORRECT PRIOR BOOK BALANCES					49,759.
ADJUSTMENT FOR PROGRAM RELATED INVESTMENTS					700,000.
TOTAL TO FORM 990-PF, PART III, LINE 5					749,759.

FORM 990-PF	CORPORATE STOCK	STATEMENT	11
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
K-1S	56,487,164.	77,264,588.	
OTHER ENTITY	12,107,365.	15,678,873.	
OFFSHORE	16,352,747.	18,408,543.	
CHESTNUT HEDGE FUND	5,605,248.	4,435,900.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	90,552,524.	115,787,904.	

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	12
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FURNITURE	11,952.	11,951.	1.
COMPUTER	13,214.	13,213.	1.
LEASEHOLD IMPROVEM	2,436.	2,411.	25.
FURNITURE	3,559.	3,520.	39.
EQUIPMENT	5,302.	5,302.	0.
OFFICE EQUIPMENT	16,741.	16,209.	532.
ARCHITECT	2,178.	2,109.	69.
LEASEHOLD IMPROVEM	11,833.	11,833.	0.
LEASEHOLD IMPROVEM	405.	405.	0.
EQUIPMENT	9,828.	9,828.	0.
EQUIPMENT	19,629.	19,629.	0.
EQUIPMENT	13,773.	13,773.	0.
FURNITURE	3,471.	3,471.	0.
LEASEHOLD IMPROVEM	12,182.	12,182.	0.
COMPUTER	15,821.	15,821.	0.
FURNITURE	291.	291.	0.
COMPUTER	2,480.	2,399.	81.
COMPUTER MONITOR	2,180.	2,109.	71.
COMPUTER EQUIPMENT	3,468.	3,468.	0.
FURNITURE	950.	950.	0.
FURNITURE	1,275.	1,275.	0.
OFFICE EQUIPMENT	30,048.	30,048.	0.
COMPUTER EQUIPMENT	10,955.	10,955.	0.
EQUIPMENT	887.	886.	1.
LCD MONITOR	719.	719.	0.
EQUIPMENT	3,452.	3,452.	0.
HARD DRIVE	245.	245.	0.
FURNITURE	3,258.	3,258.	0.
LEASEHOLD IMPROV.	630.	629.	1.
LEASEHOLD IMPROV.	1,508.	1,508.	0.
COMPUTER EQUIPMENT	95,520.	95,520.	0.
COMPUTER EQUIPMENT	42,977.	42,977.	0.

FURNITURE	208,166.	208,165.	1.
FURNITURE	31,261.	31,261.	0.
FURNITURE	23,396.	22,875.	521.
COMPUTER EQUIPMENT	14,855.	14,855.	0.
FURNITURE	53,761.	47,763.	5,998.
FURNITURE	7,703.	7,703.	0.
FURNITURE	13,219.	13,219.	0.
FURNITURE	14,369.	10,921.	3,448.
FURNITURE	10,060.	6,036.	4,024.
TOTAL TO FM 990-PF, PART II, LN 14	719,957.	705,144.	14,813.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 13
TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CATHY J. LURIE C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE 1.00	0.	0.	0.
JEFFREY R. LURIE C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE 1.00	0.	0.	0.
MARK D. BALK C/O GOULSTON & STORRS, 400 ATLANTIC AVENUE BOSTON, MA 02110	TRUSTEE 1.00	0.	0.	0.
HARVEY E. CUSHING C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE 20.00	150,750.	0.	0.
NANCY L. MARKS C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE 1.00	0.	0.	0.
CHRISTINA LURIE C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE 1.00	0.	0.	0.

THE NANCY LURIE MARKS FAMILY FOUNDATION

04-2607232

RICHARD B. DENNING	TRUSTEE			
C/O NLM FOUNDATION, 60 WILLIAMS				
ST.	20.00	157,567.	8,303.	0.
WELLESLEY, MA 02481				

CLARENCE SCHUTT	DIRECTOR			
C/O NLM FOUNDATION, 60 WILLIAMS				
ST.	40.00	408,667.	0.	0.
WELLESLEY, MA 02481				

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

716,984.	8,303.	0.
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2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	FURNITURE	060196200DB	7.00	17	11,952.				11,952.	11,951.		0.
2	COMPUTER	060196200DB	5.00	17	13,214.				13,214.	13,213.		0.
3	LEASEHOLD IMPROVEM	060197200DB	7.00	17	2,436.				2,436.	2,411.		0.
4	FURNITURE	060197200DB	7.00	17	3,559.				3,559.	3,520.		0.
5	EQUIPMENT	060197200DB	5.00	17	5,302.				5,302.	5,302.		0.
6	OFFICE EQUIPMENT	091597200DB	7.00	17	16,741.				16,741.	16,209.		0.
7	ARCHITECT	091597200DB	7.00	17	2,178.				2,178.	2,109.		0.
8	LEASEHOLD IMPROVEM	050198200DB	7.00	17	11,833.				11,833.	11,833.		0.
9	LEASEHOLD IMPROVEM	120197200DB	7.00	17	405.				405.	405.		0.
10	EQUIPMENT	010198200DB	5.00	17	9,828.				9,828.	9,828.		0.
11	EQUIPMENT	060198200DB	5.00	17	19,629.				19,629.	19,629.		0.
12	EQUIPMENT	090198200DB	5.00	17	13,773.				13,773.	13,773.		0.
13	FURNITURE	120197200DB	7.00	17	3,471.				3,471.	3,471.		0.
14	LEASEHOLD IMPROVEM	030198200DB	7.00	17	12,182.				12,182.	12,182.		0.
15	COMPUTER	040199200DB	5.00	17	15,821.				15,821.	15,821.		0.
16	FURNITURE	040199200DB	7.00	17	291.				291.	291.		0.
17	COMPUTER	102500200DB	5.00	17	2,480.				2,480.	2,399.		0.
18	COMPUTER MONITOR	092900200DB	5.00	17	2,180.				2,180.	2,109.		0.

328102
05-01-13

(D) - Asset disposed

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

2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
19	COMPUTER EQUIPMENT	022800	200DB	5.00	17	3,468.			3,468.	3,468.		0.
20	FURNITURE	080601	200DB	7.00	17	950.			950.	950.		0.
21	FURNITURE	062101	200DB	7.00	17	1,275.			1,275.	1,275.		0.
22	OFFICE EQUIPMENT	042601	200DB	5.00	17	30,048.			30,048.	30,048.		0.
23	COMPUTER EQUIPMENT	072301	200DB	5.00	17	10,955.			10,955.	10,955.		0.
24	EQUIPMENT	052101	200DB	5.00	17	887.			887.	886.		0.
25	LCD MONITOR	031802	200DB	5.00	17	719.			719.	719.		0.
26	EQUIPMENT	050602	200DB	5.00	17	3,452.			3,452.	3,452.		0.
27	HARD DRIVE	062602	200DB	5.00	17	245.			245.	245.		0.
28	FURNITURE	050103	200DB	7.00	17	3,258.			3,258.	3,258.		0.
29	LEASEHOLD IMPROV.	110802	200DB	7.00	17	630.			630.	629.		0.
30	LEASEHOLD IMPROV.	031403	200DB	7.00	17	1,508.			1,508.	1,508.		0.
31	COMPUTER EQUIPMENT	050104	200DB	5.00	17	95,520.		47,760.	47,760.	47,760.		0.
32	COMPUTER EQUIPMENT	050105	200DB	5.00	17	42,977.			42,977.	42,977.		0.
33	FURNITURE	050106	200DB	7.00	17	208,166.			208,166.	208,165.		0.
34	FURNITURE	050107	200DB	7.00	17	31,261.			31,261.	29,868.		1,393.
35	FURNITURE	050108	200DB	7.00	17	23,396.		11,698.	11,698.	10,132.		1,045.
36	COMPUTER EQUIPMENT	040109	200DB	5.00	17	14,855.		7,428.	7,427.	7,000.		427.

328102
05-01-13

(D) - Asset disposed

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

2013 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
37	FURNITURE	050110	200DB	7.00	17	53,761.		26,881.	26,880.	18,482.		2,400.
38	FURNITURE	070111	200DB	5.00	17	7,703.		7,703.				0.
39	FURNITURE	111511	200DB	5.00	17	13,219.		13,219.				0.
40	FURNITURE	011513	200DB	5.00	17	14,369.		7,185.	7,184.	1,437.		2,299.
41	FURNITURE	051514	200DB	5.00	19B	10,060.		5,030.	5,030.			6,036.
* TOTAL 990-PF PG 1 DEPR						719,957.		126,904.	593,053.	569,670.	0.	13,600.

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 NANCY LURIE MARKS FAMILY FOUNDATION FORM 990-PF PAGE 1

04-2607232

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	5,030.
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	7,564.
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		5,030.	5 YRS.	HY	200DB	1,006.
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	13,600.
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
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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.

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
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
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42 Amortization of costs that begins during your 2013 tax year:

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43 Amortization of costs that began before your 2013 tax year

43

44 Total. Add amounts in column (f). See the instructions for where to report

44

NANCY LURIE MARKS FAMILY FOUNDATION

CHARITABLE CONTRIBUTIONS

November 1, 2013 - October 31, 2014

	Recipient	Relationship	Status	Purpose	Amount
1	AUTISM CONSORTIUM	NONE	501(c)(3)	Medical Research	\$ 275,000 00
2	BETH ISRAEL DEACONESS MEDICAL CENTER	NONE	501(c)(3)	Medical Research	\$ 436,447 32
3	BOSTON CHILDREN'S HOSPITAL	NONE	501(c)(3)	Medical Research	\$ 887,247 50
4	BOSTON HEALTH CARE FOR THE HOMELESS PROGRAM	NONE	501(c)(3)	Medical Research	\$ 5,000 00
5	BRANDEIS UNIVERSITY	NONE	501(c)(3)	Education	\$ 200,000 00
6	BROWN UNIVERSITY	NONE	501(c)(3)	Education	\$ 31 250 00
7	COLD SPRING HARBOR	NONE	501(c)(3)	Medical Research	\$ 50,000 00
8	EAGLES YOUTH PARTNERSHIP	NONE	501(c)(3)	Public Welfare	\$ 15,000 00
9	EMMA PENDLETON BRADLEY HOSPITAL	NONE	501(c)(3)	Medical Research	\$ 140,000 00
10	FACING HISTORY & OURSELVES	NONE	501(c)(3)	Cultural	\$ 5,000 00
11	HARVARD MEDICAL SCHOOL	NONE	501(c)(3)	Medical Research	\$ 614,660 00
12	HEBREW SENIOR LIFE	NONE	501(c)(3)	Public Welfare	\$ 5,000 00
13	INTERNATIONAL SOCIETY FOR AUTISM RESEARCH	NONE	501(c)(3)	Medical Research	\$ 10,000 00
14	JEWISH FILM FESTIVAL	NONE	501(c)(3)	Cultural	\$ 8,100 00
15	MAINE MEDICAL CENTER	NONE	501(c)(3)	Medical Research	\$ 301,273 00
16	MASSACHUSETTS GENERAL HOSPITAL	NONE	501(c)(3)	Medical Research	\$ 701,627 50
17	MASSACHUSETTS INSTITUTE OF TECHNOLOGY	NONE	501(c)(3)	Education	\$ 386,860 00
18	MINNESOTA AUTISM CENTER	NONE	501(c)(3)	Public Welfare	\$ 144,059 73
19	PHILADELPHIA ART MUSEUM	NONE	501(c)(3)	Cultural	\$ 5,000 00
20	RUTGERS UNIVERSITY	NONE	501(c)(3)	Education	\$ 113,000 00
21	STANFORD UNIVERSITY	NONE	501(c)(3)	Education	\$ 42,612 00
22	STEMINA BIOMARKER DISCOVERY, INC	NONE	Private Corporation	Medical Research	\$ 700,000 00
23	SYRACUSE UNIVERSITY	NONE	501(c)(3)	Education	\$ 136,420 00
24	TUFTS UNIVERSITY	NONE	501(c)(3)	Education	\$ 75,000 00
25	UNIVERSITY OF CALIFORNIA	NONE	501(c)(3)	Education	\$ 30,000 00
26	UNIVERSITY OF KENTUCKY	NONE	501(c)(3)	Education	\$ 500 00
27	UNIVERSITY OF MASSACHUSETTS	NONE	501(c)(3)	Education	\$ 25,000 00
	Total				<u>\$ 5,344,057 05</u>

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

Department of the Treasury
Internal Revenue Service

► **File a separate application for each return.**

► **Information about Form 8868 and its instructions is at www.irs.gov/form8868.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	THE NANCY LURIE MARKS FAMILY FOUNDATION	Employer identification number (EIN) or 04-2607232
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions 60 WILLIAM STREET, SUITE 110	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. WELLESLEY, MA 02481	

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

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
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

GOULSTON & STORRS

- The books are in the care of ► **400 ATLANTIC AVE. BOSTON, MA - 02110**

Telephone No. ► **617-482-1776**

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.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **JUNE 15, 2015**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year _____ or
- ☒ tax year beginning **NOV 1, 2013**, and ending **OCT 31, 2014**

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
- ☐ Change in accounting period

3a 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.	3a	\$ 203,869.
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.	3b	\$ 153,869.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$ 50,000.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- 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.	Employer identification number (EIN) or
	THE NANCY LURIE MARKS FAMILY FOUNDATION	04-2607232
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	60 WILLIAM STREET, SUITE 110	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	WELLESLEY, MA 02481	

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.

GOULSTON & STORRS

- The books are in the care of **400 ATLANTIC AVE. BOSTON, MA - 02110**

Telephone No. **617-482-1776**

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 **SEPTEMBER 15, 2015**.

5 For calendar year , or other tax year beginning **NOV 1, 2013**, and ending **OCT 31, 2014**.

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

ADDITIONAL TIME IS NEEDED IN ORDER TO FILE A COMPLETE AND ACCURATE TAX 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	\$	203,869.
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	\$	203,869.
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 **Dana Cohen** Title **CPA**

Date **06/09/2015**

Form 8868 (Rev. 1-2014)