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## Return of Private Foundation

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

OMB No. 1545-0052

2014

Department of the Treasury  
Internal Revenue Service

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Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

Open to Public Inspection

For calendar year 2014 or tax year beginning

, and ending

|  |  |  |  |                                       |   |   |                                      |  |
|--|--|--|--|---------------------------------------|---|---|--------------------------------------|--|
| Name of foundation<br><b>THE GEORGE PRESTON MARSHALL FOUNDATION</b>  |  | A Employer identification number<br><b>23-7173302</b>  |  |                                       |   |   |                                      |  |
| Number and street (or P.O. box number if mail is not delivered to street address)<br><b>4300 MONTGOMERY AVENUE</b>   | Room/suite<br><b>104</b>   | B Telephone number<br><b>(301) 654-7774</b>  |  |                                       |   |   |                                      |  |
| City or town, state or province, country, and ZIP or foreign postal code<br><b>BETHESDA, MD 20814</b>  |  | C If exemption application is pending, check here <input type="checkbox"/>                                       |  |                                       |   |   |                                      |  |
| G Check all that apply: <table border="0"> <tr> <td><input type="checkbox"/> Initial return</td> <td><input type="checkbox"/> Initial return of a former public charity</td> </tr> <tr> <td><input type="checkbox"/> Final return</td> <td><input type="checkbox"/> Amended return</td> </tr> <tr> <td><input type="checkbox"/> Address change</td> <td><input type="checkbox"/> Name change</td> </tr> </table> |  | <input type="checkbox"/> Initial return  | <input type="checkbox"/> Initial return of a former public charity | <input type="checkbox"/> Final return | <input type="checkbox"/> Amended return | <input type="checkbox"/> Address change | <input type="checkbox"/> Name change | D 1. Foreign organizations, check here <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| <input type="checkbox"/> Initial return  | <input type="checkbox"/> Initial return of a former public charity   |  |  |                                       |   |   |                                      |  |
| <input type="checkbox"/> Final return  | <input type="checkbox"/> Amended return  |  |  |                                       |   |   |                                      |  |
| <input type="checkbox"/> Address change  | <input type="checkbox"/> Name change   |  |  |                                       |   |   |                                      |  |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><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)<br><b>\$ 629,278.</b>   | J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><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<br>(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  |  | 1,113,785.                         |                           | N/A                     |   |
| 2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B   |  |                                    |                           |                         |   |
| 3 Interest on savings and temporary cash investments  |  | 55.                                | 55.                       |                         | STATEMENT 1   |
| 4 Dividends and interest from securities  |  |                                    |                           |                         |   |
| 5a Gross rents  |  |                                    |                           |                         |   |
| b Net rental income or (loss)   |  |                                    |                           |                         |   |
| 6a Net gain or (loss) from sale of assets not on line 10  |  |                                    |                           |                         |   |
| b Gross sales price for all assets on line 6a   |  |                                    |                           |                         |   |
| 7 Capital gain net income (from Part IV, line 2)  |  |                                    | 0.                        |                         |   |
| 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   |  |                                    |                           |                         |   |
| 12 Total. Add lines 1 through 11  |  | 1,113,840.                         | 55.                       |                         |   |
| 13 Compensation of officers, directors, trustees, etc   |  | 47,200.                            | 0.                        |                         | 47,200.   |
| 14 Other employee salaries and wages  |  |                                    |                           |                         |   |
| 15 Pension plans, employee benefits   |  | 7,200.                             | 0.                        |                         | 7,200.  |
| 16a Legal fees  |  |                                    |                           |                         |   |
| b Accounting fees STMT 2  |  | 3,500.                             | 0.                        |                         | 3,500.  |
| c Other professional fees   |  |                                    |                           |                         |   |
| 17 Interest   |  |                                    |                           |                         |   |
| 18 Taxes STMT 3   |  | 3,611.                             | 0.                        |                         | 3,611.  |
| 19 Depreciation and depletion   |  |                                    |                           |                         |   |
| 20 Occupancy  |  | 16,722.                            | 0.                        |                         | 16,722.   |
| 21 Travel, conferences, and meetings  |  |                                    |                           |                         |   |
| 22 Printing and publications  |  | 3,905.                             | 0.                        |                         | 3,905.  |
| 23 Other expenses STMT 4  |  | 6,124.                             | 0.                        |                         | 6,124.  |
| 24 Total operating and administrative expenses. Add lines 13 through 23   |  | 88,262.                            | 0.                        |                         | 88,262.   |
| 25 Contributions, gifts, grants paid  |  | 476,900.                           |                           |                         | 476,900.  |
| 26 Total expenses and disbursements. Add lines 24 and 25  |  | 565,162.                           | 0.                        |                         | 565,162.  |
| 27 Subtract line 26 from line 12:   |  |                                    |                           |                         |   |
| a Excess of revenue over expenses and disbursements   |  | 548,678.                           |                           |                         |   |
| b Net investment income (if negative, enter -0-)  |  |                                    | 55.                       |                         |   |
| 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 |
| <b>Assets</b>  | 1 Cash - non-interest-bearing   | 1,537.  | 286.           | 286.                  |
|  | 2 Savings and temporary cash investments  | 77,963.   | 627,892.       | 627,892.              |
|  | 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   |   |                |                       |
|  | <b>Liabilities</b>  | 11 Investments - land, buildings, and equipment basis ▶ |                |                       |
| Less accumulated depreciation ▶  |   |   |                |                       |
| 12 Investments - mortgage loans  |   |   |                |                       |
| 13 Investments - other   |   |   |                |                       |
| 14 Land, buildings, and equipment: basis ▶ 1,309.  |   |   |                |                       |
| Less accumulated depreciation STMT 5 ▶ 1,309.  |   |   |                |                       |
| 15 Other assets (describe ▶ SECURITY DEPOSITS )  |   | 1,100.  | 1,100.         | 1,100.                |
| 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I) |   | 80,600.   | 629,278.       | 629,278.              |
| 17 Accounts payable and accrued expenses   |   |   |                |                       |
| 18 Grants payable  |   |   |                |                       |
| <b>Net Assets or Fund Balances</b>   | 19 Deferred revenue   |   |                |                       |
|  | 20 Loans from officers, directors, trustees, and other disqualified persons               |   |                |                       |
|  | 21 Mortgages and other notes payable  |   |                |                       |
|  | 22 Other liabilities (describe ▶ STATEMENT 6 )  | 3,656.  | 3,656.         |                       |
| 23 Total liabilities (add lines 17 through 22)   | 3,656.  | 3,656.  |                |                       |
| <b>Net Assets or Fund Balances</b>   | Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>                   |   |                |                       |
|  | 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                                       | 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                              | 76,944.   | 625,622.  |                |                       |
| 30 Total net assets or fund balances   | 76,944.   | 625,622.  |                |                       |
| 31 Total liabilities and net assets/fund balances  | 80,600.   | 629,278.  |                |                       |

**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 | 76,944.  |
| 2 Enter amount from Part I, line 27a   | 2 | 548,678. |
| 3 Other increases not included in line 2 (itemize) ▶   | 3 | 0.       |
| 4 Add lines 1, 2, and 3  | 4 | 625,622. |
| 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 | 625,622. |

**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<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|--|--|--------------------------------------|----------------------------------|
| 1a   |  |                                      |                                  |
| b  | NONE   |                                      |                                  |
| c  |  |                                      |                                  |
| d  |  |                                      |                                  |
| e  |  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--|---|--|
| a                     |  |   |  |
| b                     |  |   |  |
| c                     |  |   |  |
| d                     |  |   |  |
| e                     |  |   |  |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |   | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---|--------------------------------------|---|---|
| (i) F.M.V. as of 12/31/69   | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |   |
| a   |                                      |   |   |
| b   |                                      |   |   |
| c   |                                      |   |   |
| d   |                                      |   |   |
| e   |                                      |   |   |

|   |   |   |  |
|---|---|---|--|
| 2 Capital gain net income or (net capital loss)   | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 | 2 |  |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c).<br>If (loss), enter -0- in Part I, line 8 |   | 3 |  |

**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)<br>Base period years<br>Calendar year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|--|--|--|---|
| 2013   | 367,124.                                 | 58,733.                                      | 6.250728  |
| 2012   | 290,678.                                 | 30,743.                                      | 9.455095  |
| 2011   | 455,520.                                 | 151,566.                                     | 3.005423  |
| 2010   | 584,362.                                 | 272,658.                                     | 2.143205  |
| 2009   | 410,522.                                 | 28,919.                                      | 14.195581   |

|   |   |            |
|---|---|------------|
| 2 Total of line 1, column (d)   | 2 | 35.050032  |
| 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 | 7.010006   |
| 4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  | 4 | 343,140.   |
| 5 Multiply line 4 by line 3   | 5 | 2,405,413. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)  | 6 | 1.         |
| 7 Add lines 5 and 6   | 7 | 2,405,414. |
| 8 Enter qualifying distributions from Part XII, line 4<br>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.<br>See the Part VI instructions. | 8 | 565,162.   |

**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<br>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 <input type="checkbox"/> and enter 1% of Part I, line 27b   |    | 1 | 1. |
| 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. |
| 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. |
| 6 Credits/Payments:   |    |   |    |
| a 2014 estimated tax payments and 2013 overpayment credited to 2014   | 6a |   |    |
| 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  |   | 0. |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input 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  |   | 1. |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  | 10 |   |    |
| 11 Enter the amount of line 10 to be: Credited to 2015 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>   | 11 |   |    |

**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)?<br>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:<br>(1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input 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 type="checkbox"/> \$ 0.  |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br>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?<br>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:<br>• By language in the governing instrument, or<br>• 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) <input type="checkbox"/> MD, DC   |     |    |
| 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 2014 or the taxable year beginning in 2014 (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  |

N/A

SEE STATEMENT 7

**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?  | 13 | X   |    |
| Website address ► <u>N/A</u>   |  |    |     |    |
| 14   | The books are in care of ► <u>BARBARA JONES</u> Telephone no. ► <u>(301) 654-7774</u>  |    |     |    |
| Located at ► <u>4300 MONTGOMERY AVENUE, STE 104, BETHESDA, MD</u> ZIP+4 ► <u>20814</u> |  |    |     |    |
| 15   | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here<br>and enter the amount of tax-exempt interest received or accrued during the year   | 15 | N/A |    |
| 16   | At any time during calendar year 2014, 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?<br>See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly 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 type="checkbox"/> Yes <input checked="" 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)?<br>Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/> 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 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   | 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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   | 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. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>► _____   |     |    |
| 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 2014 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 2014.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | 3b  |    |
| 4a  | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   | 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 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No   | 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 4945(d)(4)(A)? (see instructions)

☐ 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

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 8      |   | 47,200.                                   | 7,200.  | 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

Form 990-PF (2014)

**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 N/A |          |
|       |          |
|       |          |
|       |          |
| 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 N/A  |        |
|  |        |
|  |        |
|  |        |
| 2  |        |
|  |        |
|  |        |
|  |        |
| All other program-related investments. See instructions. |        |
| 3  |        |
|  |        |
|  |        |
|  |        |

Total. Add lines 1 through 3

0.



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

|          |  |           |          |
|----------|--|-----------|----------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:  |           |          |
| <b>a</b> | Average monthly fair market value of securities  | <b>1a</b> | 0.       |
| <b>b</b> | Average of monthly cash balances   | <b>1b</b> | 347,265. |
| <b>c</b> | Fair market value of all other assets  | <b>1c</b> | 1,100.   |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c)  | <b>1d</b> | 348,365. |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)    | <b>1e</b> | 0.       |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets   | <b>2</b>  | 0.       |
| <b>3</b> | Subtract line 2 from line 1d   | <b>3</b>  | 348,365. |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)    | <b>4</b>  | 5,225.   |
| <b>5</b> | <b>Net value of noncharitable-use assets</b> . Subtract line 4 from line 3. Enter here and on Part V, line 4 | <b>5</b>  | 343,140. |
| <b>6</b> | <b>Minimum investment return</b> . Enter 5% of line 5  | <b>6</b>  | 17,157.  |

**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.)

|           |   |           |         |
|-----------|---|-----------|---------|
| <b>1</b>  | Minimum investment return from Part X, line 6   | <b>1</b>  | 17,157. |
| <b>2a</b> | Tax on investment income for 2014 from Part VI, line 5  | <b>2a</b> | 1.      |
| <b>b</b>  | Income tax for 2014. (This does not include the tax from Part VI.)  | <b>2b</b> |         |
| <b>c</b>  | Add lines 2a and 2b   | <b>2c</b> | 1.      |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1                                     | <b>3</b>  | 17,156. |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions   | <b>4</b>  | 0.      |
| <b>5</b>  | Add lines 3 and 4   | <b>5</b>  | 17,156. |
| <b>6</b>  | Deduction from distributable amount (see instructions)  | <b>6</b>  | 0.      |
| <b>7</b>  | <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | <b>7</b>  | 17,156. |

**Part XII****Qualifying Distributions** (see instructions)

|          |   |           |          |
|----------|---|-----------|----------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  |           |          |
| <b>a</b> | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26   | <b>1a</b> | 565,162. |
| <b>b</b> | Program-related investments - total from Part IX-B  | <b>1b</b> | 0.       |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                         | <b>2</b>  |          |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the:  |           |          |
| <b>a</b> | Suitability test (prior IRS approval required)  | <b>3a</b> |          |
| <b>b</b> | Cash distribution test (attach the required schedule)   | <b>3b</b> |          |
| <b>4</b> | <b>Qualifying distributions</b> . Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                | <b>4</b>  | 565,162. |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | <b>5</b>  | 0.       |
| <b>6</b> | <b>Adjusted qualifying distributions</b> . Subtract line 5 from line 4  | <b>6</b>  | 565,162. |

**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)<br>Corpus | (b)<br>Years prior to 2013 | (c)<br>2013 | (d)<br>2014 |
|--|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2014 from Part XI, line 7   |               |                            |             | 17,156.     |
| 2 Undistributed income, if any, as of the end of 2014  |               |                            |             |             |
| a Enter amount for 2013 only   |               |                            | 0.          |             |
| b Total for prior years:   |               | 0.                         |             |             |
| 3 Excess distributions carryover, if any, to 2014:   |               |                            |             |             |
| a From 2009  | 409,076.      |                            |             |             |
| b From 2010  | 570,730.      |                            |             |             |
| c From 2011  | 447,942.      |                            |             |             |
| d From 2012  | 289,141.      |                            |             |             |
| e From 2013  | 364,187.      |                            |             |             |
| f Total of lines 3a through e  | 2,081,076.    |                            |             |             |
| 4 Qualifying distributions for 2014 from Part XII, line 4: ► \$  | 565,162.      |                            |             |             |
| a Applied to 2013, but not more than line 2a   |               |                            | 0.          |             |
| 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 2014 distributable amount   |               |                            |             | 17,156.     |
| e Remaining amount distributed out of corpus   | 548,006.      |                            |             |             |
| 5 Excess distributions carryover applied to 2014 (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:   | 2,629,082.    |                            |             |             |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5  |               |                            |             |             |
| 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 2013. Subtract line 4a from line 2a. Taxable amount - see instr.  |               |                            | 0.          |             |
| f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015  |               |                            |             | 0.          |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)       | 0.            |                            |             |             |
| 8 Excess distributions carryover from 2009 not applied on line 5 or line 7   | 409,076.      |                            |             |             |
| 9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a  | 2,220,006.    |                            |             |             |
| 10 Analysis of line 9:   |               |                            |             |             |
| a Excess from 2010   | 570,730.      |                            |             |             |
| b Excess from 2011   | 447,942.      |                            |             |             |
| c Excess from 2012   | 289,141.      |                            |             |             |
| d Excess from 2013   | 364,187.      |                            |             |             |
| e Excess from 2014   | 548,006.      |                            |             |             |



**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business) | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount   |
|--|--|--------------------------------------|-------------------------------------|----------|
| <b>a</b> <i>Paid during the year</i>             |  |                                      |                                     |          |
| SEE ATTACHED SCHEDULE                            | N/A  | N/A                                  | TO SUPPORT YOUTH<br>ACTIVITIES      | 476,900. |
|  |  |                                      |                                     |          |
|  |  |                                      |                                     |          |
|  |  |                                      |                                     |          |
|  |  |                                      |                                     |          |
|  |  |                                      |                                     |          |
| <b>Total</b>                                     | <b>▶ 3a</b>  |                                      |                                     | 476,900. |
| <b>b</b> <i>Approved for future payment</i>      |  |                                      |                                     |          |
| NONE   |  |                                      |                                     |          |
|  |  |                                      |                                     |          |
|  |  |                                      |                                     |          |
|  |  |                                      |                                     |          |
| <b>Total</b>                                     | <b>▶ 3b</b>  |                                      |                                     | 0.       |





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

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

OMB No 1545-0047

**2014**

Name of the organization

THE GEORGE PRESTON MARSHALL FOUNDATION

Employer identification number

23-7173302

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)( ) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

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

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

|   |                                |
|---|--------------------------------|
| Name of organization                          | Employer identification number |
| <b>THE GEORGE PRESTON MARSHALL FOUNDATION</b> | <b>23-7173302</b>              |

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

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution   |
|------------|---|----------------------------|---|
| 1          | TRUST FOR GEORGE PRESTON MARSHALL ESTATE<br><br>W.D. FOOTE, JR., 200-A MONROE ST. #110<br><br>ROCKVILLE, MD 20850 | \$ 1,113,785.              | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
|            |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
|            |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
|            |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
|            |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
|            |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
|            |   | \$                         | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |



Employer identification number

23-7173302

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

| (a)<br>No.<br>from<br>Part I | (b)<br><br>Description of noncash property given | (c)<br><br>FMV (or estimate)<br>(see instructions) | (d)<br><br>Date received |
|------------------------------|--|--|--------------------------|
|                              | _____<br>_____<br>_____                          | \$ _____   | _____                    |
| (a)<br>No.<br>from<br>Part I | (b)<br><br>Description of noncash property given | (c)<br><br>FMV (or estimate)<br>(see instructions) | (d)<br><br>Date received |
|                              | _____<br>_____<br>_____                          | \$ _____   | _____                    |
| (a)<br>No.<br>from<br>Part I | (b)<br><br>Description of noncash property given | (c)<br><br>FMV (or estimate)<br>(see instructions) | (d)<br><br>Date received |
|                              | _____<br>_____<br>_____                          | \$ _____   | _____                    |
| (a)<br>No.<br>from<br>Part I | (b)<br><br>Description of noncash property given | (c)<br><br>FMV (or estimate)<br>(see instructions) | (d)<br><br>Date received |
|                              | _____<br>_____<br>_____                          | \$ _____   | _____                    |
| (a)<br>No.<br>from<br>Part I | (b)<br><br>Description of noncash property given | (c)<br><br>FMV (or estimate)<br>(see instructions) | (d)<br><br>Date received |
|                              | _____<br>_____<br>_____                          | \$ _____   | _____                    |
| (a)<br>No.<br>from<br>Part I | (b)<br><br>Description of noncash property given | (c)<br><br>FMV (or estimate)<br>(see instructions) | (d)<br><br>Date received |
|                              | _____<br>_____<br>_____                          | \$ _____   | _____                    |
| (a)<br>No.<br>from<br>Part I | (b)<br><br>Description of noncash property given | (c)<br><br>FMV (or estimate)<br>(see instructions) | (d)<br><br>Date received |
|                              | _____<br>_____<br>_____                          | \$ _____   | _____                    |

|   |                                |
|---|--------------------------------|
| Name of organization                          | Employer identification number |
| <b>THE GEORGE PRESTON MARSHALL FOUNDATION</b> | <b>23-7173302</b>              |

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

Use duplicate copies of Part III if additional space is needed

| (a) No.<br>from<br>Part I | (b) Purpose of gift                     | (c) Use of gift | (d) Description of how gift is held      |
|---------------------------|---|-----------------|--|
|                           |   |                 |  |
|                           |   |                 |  |
|                           |   |                 |  |
|                           | (e) Transfer of gift                    |                 |  |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |   |                 |  |
|                           |   |                 |  |
|                           |   |                 |  |
|                           | (e) Transfer of gift                    |                 |  |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |   |                 |  |
|                           |   |                 |  |
|                           |   |                 |  |
|                           | (e) Transfer of gift                    |                 |  |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |   |                 |  |
|                           |   |                 |  |
|                           |   |                 |  |
|                           | (e) Transfer of gift                    |                 |  |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |   |                 |  |
|                           |   |                 |  |
|                           |   |                 |  |
|                           | (e) Transfer of gift                    |                 |  |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |   |                 |  |
|                           |   |                 |  |
|                           |   |                 |  |

## FORM 990-PF. INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

| SOURCE                                | (A)<br>REVENUE<br>PER BOOKS | (B)<br>NET INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME |
|---------------------------------------|-----------------------------|---------------------------------|-------------------------------|
| SUNTRUST INVESTMENT SERVICES,<br>INC. | 55.                         | 55.                             |                               |
| TOTAL TO PART I, LINE 3               | 55.                         | 55.                             |                               |

## FORM 990-PF ACCOUNTING FEES STATEMENT 2

| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| MCGLADREY LLP                | 3,500.                       | 0.                                |                               | 3,500.                        |
| TO FORM 990-PF, PG 1, LN 16B | 3,500.                       | 0.                                |                               | 3,500.                        |

## FORM 990-PF TAXES STATEMENT 3

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| PAYROLL TAXES               | 3,611.                       | 0.                                |                               | 3,611.                        |
| TO FORM 990-PF, PG 1, LN 18 | 3,611.                       | 0.                                |                               | 3,611.                        |

## FORM 990-PF OTHER EXPENSES STATEMENT 4

| DESCRIPTION                | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| BANK SERVICE CHARGES       | 639.                         | 0.                                |                               | 639.                          |
| DELIVERY & COURIER EXPENSE | 316.                         | 0.                                |                               | 316.                          |
| OFFICE SUPPLIES & EXPENSES | 1,501.                       | 0.                                |                               | 1,501.                        |
| INSURANCE EXPENSE          | 644.                         | 0.                                |                               | 644.                          |
| POSTAGE EXPENSE            | 691.                         | 0.                                |                               | 691.                          |
| TELEPHONE EXPENSE          | 2,298.                       | 0.                                |                               | 2,298.                        |

|                             |        |    |        |
|-----------------------------|--------|----|--------|
| PENALTY                     | 35.    | 0. | 35.    |
| TO FORM 990-PF, PG 1, LN 23 | 6,124. | 0. | 6,124. |

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| FORM 990-PF | DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT | STATEMENT | 5 |
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| DESCRIPTION                        | COST OR<br>OTHER BASIS | ACCUMULATED<br>DEPRECIATION | BOOK VALUE |
|------------------------------------|------------------------|-----------------------------|------------|
| COMPUTER - DELL DESKTOP            | 1,309.                 | 1,309.                      | 0.         |
| TOTAL TO FM 990-PF, PART II, LN 14 | 1,309.                 | 1,309.                      | 0.         |

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| FORM 990-PF | OTHER LIABILITIES | STATEMENT | 6 |
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| DESCRIPTION                            | BOY AMOUNT | EOY AMOUNT |
|--|------------|------------|
| PAYROLL TAXES PAYABLE                  | 3,656.     | 3,656.     |
| TOTAL TO FORM 990-PF, PART II, LINE 22 | 3,656.     | 3,656.     |

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| FORM 990-PF | EXPLANATION CONCERNING PART VII-A, LINE 8B | STATEMENT | 7 |
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EXPLANATION

THE ORGANIZATION HAS FURNISHED A COPY OF FORM 990-PF TO MARYLAND (STATE WHERE PRINCIPAL OFFICE IS LOCATED). THE DISTRICT OF COLUMBIA (STATE WHERE ORGANIZATION WAS CREATED) HAS NO STATUTORY REQUIREMENT FOR SUBMISSION OF COPIES OF FORM 990-PF.

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FORM 990-PF.                      PART VIII - LIST OF OFFICERS, DIRECTORS                      STATEMENT                      8  
    TRUSTEES AND FOUNDATION MANAGERS

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| NAME AND ADDRESS   | TITLE AND<br>AVRG HRS/WK        | COMPEN-<br>SATION | EMPLOYEE<br>BEN PLAN<br>CONTRIB | EXPENSE<br>ACCOUNT |
|--|---------------------------------|-------------------|---------------------------------|--------------------|
| BARBARA J. JONES<br>4300 MONTGOMERY AVENUE, SUITE 104<br>BETHESDA, MD 20814              | EXECUTIVE DIRECTOR<br>24.00     | 47,200.           | 7,200.                          | 0.                 |
| JAMES C. MCKAY<br>3501 WINDSOR PLACE<br>CHEVY CHASE, MD 20815                            | VICE-PRESIDENT/DIRECTOR<br>0.00 | 0.                | 0.                              | 0.                 |
| WILLIAM D. FOOTE, JR.<br>200-A MONROE STREET, SUITE 110<br>ROCKVILLE, MD 20850           | PRESIDENT/DIRECTOR<br>1.00      | 0.                | 0.                              | 0.                 |
| ELLIN J. NOLAN<br>7503 LYNN DRIVE<br>CHEVY CHASE, MD 20815                               | SECRETARY/DIRECTOR<br>1.00      | 0.                | 0.                              | 0.                 |
| G. DEWEY ARNOLD, III<br>4803 JAMESTOWN ROAD<br>BETHESDA, MD 20816                        | TREASURER/DIRECTOR<br>1.00      | 0.                | 0.                              | 0.                 |
| PHILIP O'DONOGHUE<br>8401 CONNECTICUT AVENUE, SUITE<br>1100<br>CHEVY CHASE, MD 208155819 | DIRECTOR<br>1.00                | 0.                | 0.                              | 0.                 |
| TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII   |                                 | 47,200.           | 7,200.                          | 0.                 |



**GRANTS PAID IN 2014**

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| <b>ALIVE!</b><br>Mr. Kenneth D. Naser, Executive Director<br>2723 King Street<br>Alexandria, VA 22302  | \$5,000  |
| <b>Arlington Soccer Association</b><br>Mr. Justin Wilt, Executive Director<br>5210 Wilson Boulevard<br>Arlington, VA 22205                       | \$6,000  |
| <b>Barker Foundation</b><br>Marilyn Regier, Rh.D., LCSW-C<br>7979 Old Georgetown Road – 1 <sup>st</sup> Floor<br>Bethesda, MD 20814              | \$20,000 |
| <b>Bread for the City</b><br>George A. Jones, Executive Director<br>1525 Seventh Street, NW<br>Washington, DC 20001                              | \$1,000  |
| <b>Bright Beginnings</b><br>Dr. Betty Jo Gaines, Executive Director<br>128 M Street, NW<br>Washington, DC 20001                                  | \$15,000 |
| <b>Capital Area Food Bank</b><br>Ms. Nancy Roman, President & CEO<br>4900 Puerto Rico Avenue, NE<br>Washington, DC 20017                         | \$1,000  |
| <b>CASA Prince George's County</b><br>Ms. Ann Marie Foley Bisner, Executive Director<br>6811 Kenilworth Avenue, Suite 402<br>Riverdale, MD 20737 | \$7,500  |
| <b>CentroNia</b><br>Ms. Myrna Peralta, President & CEO<br>1420 Columbia Road, NW<br>Washington, DC 20009   | \$30,000 |

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| <b>The Children's Inn at NIH</b><br>Ms. Kathy L. Russell, Chief Executive Officer<br>7 West Drive<br>Bethesda, MD 20814-1509                       | \$5,000  |
| <b>Chillum Youth Project</b><br>Mr. Joseph S. Emmerich, Director<br>P.O. Box 57<br>Hyattsville, Maryland 20781                                     | \$10,000 |
| <b>Christ Child Society</b><br>Ms. Kathleen Curtin, Executive Director<br>5101 Wisconsin Ave, NW, Suite 304<br>Washington, DC 20016                | \$1,000  |
| <b>Columbia Lighthouse for the Blind</b><br>Mr. Anthony J. Cancelosi, President & CEO<br>1825 K Street, NW<br>Washington, DC 20006                 | \$5,000  |
| <b>Covington &amp; Burling Public School Project</b><br>Mr. Alan Pemberton, Vice President<br>1201 Pennsylvania Avenue, NW<br>Washington, DC 20004 | \$3,000  |
| <b>Crossway Community</b><br>Ms. Kathleen Guinan, Chief Executive Officer<br>3015 Upton Drive<br>Kensington, MD 20895                              | \$1,000  |
| <b>Dance Place</b><br>Ms. Carla Perlo, Founding Director<br>3225 8 <sup>th</sup> Street, NE<br>Washington, DC 20017                                | \$6,000  |
| <b>The DC Children's Advocacy Center – Safe Shores</b><br>Ms. Michele Booth Cole, Executive Director<br>429 O Street, NW<br>Washington, DC 20001   | \$2,000  |
| <b>DC SCORES</b><br>Ms. Amy Nakamoto, Executive Director<br>1224 M Street, NW, Suite 200<br>Washington, DC 20005                                   | \$10,000 |



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| <b>DC Volunteer Lawyers Project</b><br>Ms. Jenny Brody and Ms. Karen Barker Marcou<br>Co-Executive Directors<br>5335 Wisconsin Avenue NW, Suite 440<br>Washington, DC 20015 | \$5,000  |
| <b>DC Youth Orchestra Program</b><br>Ms. Elizabeth Schurgin, Executive Director<br>1700 East Capitol Street, NE<br>Washington, DC 20003                                     | \$8,000  |
| <b>Dumbarton Concerts</b><br>Inner City Inner Child<br>Ms. Ingrid Zimmer<br>3133 Dumbarton Street, NW<br>Washington, DC 20007   | \$5,000  |
| <b>FACETS</b><br>Ms. Amanda Andere, Executive Director<br>10640 Page Avenue, Suite 300<br>Fairfax, VA 22030   | \$10,000 |
| <b>Folger Shakespeare Library</b><br>Mr. Michael Witmore, Director<br>201 East Capitol Street, SE<br>Washington, DC 20003-1004  | \$5,000  |
| <b>Fort Dupont Ice Arena</b><br>Mr. Ty Newberry, Executive Director & General Manager<br>3779 Ely Place, SE<br>Washington, DC 20019   | \$10,000 |
| <b>Foundation Schools</b><br>Ms Andrea Adler, Chief Operating Officer<br>6000 Executive Blvd., Suite 605<br>Rockville, MD 20851   | \$10,000 |
| <b>Georgetown Preparatory School</b><br>The Reverend Scott Pilarz, S.J., President<br>10900 Rockville Pike<br>North Bethesda, Maryland 20852-3299                           | \$10,000 |
| <b>Georgetown Visitation Preparatory School</b><br>Mr. Daniel Kerns, Jr., Head of School<br>1524 Thirty-fifth Street, NW<br>Washington, DC 20007-2785                       | \$10,000 |

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| <b>Girls on the Run-DC</b><br>Ms. Kristen Komlosy, Executive Director<br>1200 18 <sup>th</sup> Street NW, Suite 700<br>Washington, DC 20036                 | \$5,000  |
| <b>Girl Scouts Council of the Nation's Capital</b><br>Ms. Lidia Soto-Harmon, Chief Executive Officer<br>4301 Connecticut Avenue, NW<br>Washington, DC 20008 | \$15,000 |
| <b>Higher Achievement</b><br>Ms. Katherine Roboff, Executive Director DC Metro<br>317 8 <sup>th</sup> Street NE<br>Washington, DC 20002-6107                | \$10,000 |
| <b>House of Ruth</b><br>Ms. Winifred Wilson, Executive Director<br>5 Thomas Circle, NW<br>Washington, DC 20005  | \$1,000  |
| <b>House of Ruth Maryland</b><br>Ms. Sandi Timmins, Executive Director<br>2201 Argonne Drive<br>Baltimore, Maryland 21218-1627                              | \$5,000  |
| <b>Ivymount School &amp; Programs</b><br>Ms. Jan Wintrol, Director<br>11614 Seven Locks Road<br>Rockville, MD 20854   | \$10,000 |
| <b>JCA Interages</b><br>Mr. David Gamse, CEO<br>Ms. Carol Croll, Senior Director<br>1230 Parklawn Drive<br>Rockville, MD 20852                              | \$5,000  |
| <b>KEEN – Kids Enjoy Exercise Now Greater DC</b><br>Ms. Beata Okulska, Executive Director<br>P.O. Box 31590<br>Bethesda, MD 20827                           | \$5,000  |
| <b>The Kingsbury Center</b><br>Ms. Anne A. Hedman, Chief Operating Officer<br>5000 14 <sup>th</sup> Street, NW<br>Washington, DC 20011                      | \$10,000 |

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| <b>Lake Braddock Crew Boosters Club</b><br>Mr. Mark Valette, President<br>P.O. Box 10458<br>Burke, VA 22009-0458  | \$5,000  |
| <b>Levine Music</b><br>Mr. Peter Jablow, President & CEO<br>2801 Upton Street, NW<br>Washington, DC 20008   | \$15,000 |
| <b>Lutheran Social Services National Capital Area</b><br>Ms. Melissa Graves, Chief Executive Officer<br>4406 Georgia Avenue, NW<br>Washington, DC 20011 | \$5,000  |
| <b>Madeira</b><br>Ms. Pilar Cabeza de Vaca, Head of School<br>8327 Georgetown Pike<br>McLean, VA 22102  | \$10,000 |
| <b>Main Street Child Development Center</b><br>Ms. Carol Lieske, Director<br>4401 Sideburn Road<br>Fairfax, VA 22030                                    | \$5,000  |
| <b>Maret School</b><br>Ms. Marjo Talbott, Head of School<br>3000 Cathedral Avenue<br>Washington, DC 20008   | \$10,000 |
| <b>Marine DC Toys for Tots Foundation</b><br>Gift Processing Administrator<br>18251 Quantico Gateway Drive<br>Triangle, VA 22172                        | \$2,000  |
| <b>Martha's Table</b><br>Ms. Patty Stonesifer, President and CEO<br>2114 14th Street NW<br>Washington, D.C. 20009                                       | \$1,000  |
| <b>Montgomery College Foundation</b><br>Ms. Carol Rognrud, Executive Director<br>40 West Gude Drive, Suite 220<br>Rockville, MD 20850                   | \$5,400  |

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| <b>N Street Village</b><br>Ms. Schroeder Stribling, Executive Director<br>1333 N Street, NW<br>Washington, DC 20005              | \$1,000  |
| <b>National Cathedral School</b><br>Mrs. Kathleen Jamieson, Head of School<br>Mount Saint Alban<br>Washington, DC 20016          | \$10,000 |
| <b>National Gallery of Art</b><br>Dr. Earl Powell, III, Director<br>2000B South Club Drive<br>Landover, MD 20875                 | \$10,000 |
| <b>One World Education</b><br>Mr. Eric Goldstein, Founder & Executive Director<br>1800 Kenyon Street, NW<br>Washington, DC 20010 | \$5,000  |
| <b>PLAYWORKS Washington, DC</b><br>Ms. Susan Comfort<br>600 Pennsylvania SE, Suite 100<br>Washington, DC 20003                   | \$5,000  |
| <b>Poor Robert's Charities</b><br>Mr. Robert Abbo<br>3900-B Watson Place, NW, Apt. G2A<br>Washington, DC 20016                   | \$5,000  |
| <b>Potomac Community Resources Inc.</b><br>Mr. Stephen Riley, Executive Director<br>9200 Kentsdale Drive<br>Potomac, MD 20854    | \$6,000  |
| <b>The Potomac School</b><br>Mr. John J. Kowalik , Head of School<br>1301 Potomac School Road<br>McLean, VA 22101-2398           | \$10,000 |
| <b>Reach Incorporated</b><br>Mr. Mark Hecker, Executive Director<br>218 D Street SE<br>Washington, DC 20003                      | \$10,000 |

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| <b>Rosemount Center</b><br>Mr. Jacques Rondeau, Executive Director<br>2000 Rosemount Ave, NW<br>Washington, DC 20010   | \$1,000  |
| <b>St. Ann's Center for Children, Youth and Families</b><br>Sister Mary Bader, Chief Executive Officer<br>4901 Eastern Avenue<br>Hyattsville, MD 20782-3301                                    | \$11,000 |
| <b>Salvation Army National Capital Area</b><br>Major Louis Reckline, Area Commander<br>Divisional Headquarters<br>2626 Pennsylvania Avenue<br>Washington, D.C. 20037                           | \$1,000  |
| <b>San Miguel School</b><br>Mr. Don Mullikin, President<br>7705 Georgia Avenue, NW<br>Washington, DC 20012   | \$10,000 |
| <b>Shakespeare Theatre Company</b><br>Mr. Chris Jennings, Managing Director<br>516 Eighth Street, SE<br>Washington, DC 20003   | \$5,000  |
| <b>SOME</b><br>Father John Adams, President<br>71 "O" Street, NW<br>Washington, DC 20001   | \$6,000  |
| <b>The Treatment and Learning Centers</b><br>Patricia A. Ritter, Ph.D., Executive Director<br>2091 Gaither Road, Suite 100<br>Rockville, MD 20850  | \$10,000 |
| <b>Unity Health Care Inc</b><br>Mr. Vincent Keane, Chief Executive Officer<br>1220 12 <sup>th</sup> Street SE, Suite 120<br>Washington, DC 20003   | \$10,000 |
| <b>Washington Tennis &amp; Education Foundation</b><br>Ms. Eleni Rossides, Executive Director<br>The William H.G. FitzGerald Tennis Center<br>1600 Kennedy Streets, NW<br>Washington, DC 20011 | \$7,500  |

**Wendt Center for Loss and Healing**  
Ms. Michelle Palmer, Executive Director  
4201 Connecticut Avenue NW  
Suite 300  
Washington, DC 20008

\$7,500

**Wilderness Leadership & Learning, Inc.**  
Mr. Stephen Abraham, President  
1758 Park Road, NW  
Washington, DC 20010-2105

\$10,000

**Youth Leadership Foundation**  
Mr. David Cook, Executive Director  
5034 Wisconsin Avenue  
Suite 250  
Washington, DC 20016

\$10,000

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*\$ 476,900*

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## GEORGE PRESTON MARSHALL FOUNDATION

Suite 104  
4300 Montgomery Avenue  
Bethesda, Maryland 20814

(301) 654-7774

### APPLICATION GUIDELINES AND PROCEDURES

The George Preston Marshall Foundation awards grants to non-profit organizations for programs which provide services to children of the greater Washington, D.C. area. Children are generally regarded to be persons 18 years or younger. Grants are authorized at meetings of the Foundation directors for periods of one year only.

Applications should be made in writing to the Foundation office at any time during the year. Meetings with Foundation staff and/or site visits may be scheduled. Consideration by the board will take place at the earliest possible board meeting. Grants are not awarded to individuals and are generally restricted to projects serving the greater Washington, D.C. area.

There is no required application form, however, the outline below indicates necessary information and a suggested format.

1. Cover letter requesting grant from chief operating officer of organization.
2. Summary page:
  - Purpose of the grant
  - Amount requested
  - Number of children served by the project
  - Contact person
3. Proposal (preferably not more than 5 pages):
  - Statement of need
  - Description of project
  - Methodology, goals, objectives, time-frame, etc.
  - Project budget
  - Background of organization
4. Tax ruling from the Internal Revenue Service
5. Current board of directors
6. Current budget for organization (if different from project budget)
7. Most recent audited financial statement
8. Any additional information or materials which would be helpful in evaluating the request.
9. Please send one copy of the full proposal.