Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf.*

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation: Marcus Corporation Foundation, Inc

A Employer identification number: 39-6046268

Number and street (or P O box number if mail is not delivered to street address): 100 E Wisconsin Ave | Room/suite: 1900

B Telephone number (see instructions): (414) 905-1000

City or town: Milwaukee | State: WI | ZIP code: 53202-4125

Foreign country name | Foreign province/state/county | Foreign postal code

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation . . . . ▶ ☐

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 3,645,224

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

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	745,753			
	2	Check ▶☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	15,364	15,364	15,364	
	4	Dividends and interest from securities	59,371	58,387	59,371	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	140,359			
	b	Gross sales price for all assets on line 6a 561,682				
	7	Capital gain net income (from Part IV, line 2)		140,359		
	8	Net short-term capital gain			9,607	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	960,847	214,110	84,342	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)	43,764	10,764	10,764	33,000
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	2,414	2,414	2,414	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	46,178	13,178	13,178	33,000
	25	Contributions, gifts, grants paid	623,503			623,503
	26	**Total expenses and disbursements.** Add lines 24 and 25	669,681	13,178	13,178	656,503
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	291,166			
	b	**Net investment income** (if negative, enter -0-)		200,932		
	c	**Adjusted net income** (if negative, enter -0-)			71,164	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	53,628	5,423	5,423
	2	Savings and temporary cash investments	71,891	49,336	49,336
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ 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 (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,274,627	1,574,728	1,931,100
	c	Investments—corporate bonds (attach schedule)	576,846	994,454	1,034,365
	11	Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	625,000	625,000	625,000
	14	Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,601,992	3,248,941	3,645,224
Liabilities	17	Accounts payable and accrued expenses		355,700	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	355,700	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	2,601,992	2,893,241	
	30	**Total net assets or fund balances** (see instructions)	2,601,992	2,893,241	
	31	**Total liabilities and net assets/fund balances** (see instructions)	2,601,992	3,248,941	

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	2,601,992
2	Enter amount from Part I, line 27a	2	291,166
3	Other increases not included in line 2 (itemize) ▶	3	83
4	Add lines 1, 2, and 3	4	2,893,241
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,893,241

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	Sale of Investments-Short Tem (see attached)	P	Various	Various
b	Capital Gain Distributions	P	Various	Various
c	Slae of Investments-Long Term (see Attached)	P	Various	Various
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	209,581		200,166	9,607
b	35,502			35,502
c	316,599		221,382	95,250
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col. (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				9,607
b				35,502
c				95,250
d				
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	140,359
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) (see instructions). If (loss), enter -0- in Part I, line 8	3	9,607

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))
2013	760,396	2,440,928	0.311519
2012	710,116	2,280,612	0.311371
2011	859,373	3,187,416	0.269614
2010	930,392	3,392,494	0 274250
2009	873,497	3,205,586	0.272492

2	**Total** of line 1, column (d)	2	1.439246
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	0.287849
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	2,570,534
5	Multiply line 4 by line 3	5	739,926
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,009
7	Add lines 5 and 6	7	741,935
8	Enter qualifying distributions from Part XII, line 4	8	656,503

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ____________ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	4,019
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	4,019
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	4,019
6	Credits/Payments:		
a	2014 estimated tax payments and 2013 overpayment credited to 2014 — 6a: 2,608		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	2,608
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	1,411
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	0
11	Enter the amount of line 10 to be: **Credited to 2015 estimated tax** ▶ 598 **Refunded** ▶	11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(2)** On foundation managers. ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ________			
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	N/A	
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) ▶			
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 2014 or the taxable year beginning in 2014 (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

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶

14 The books are in care of ▶ Marcus Corp Telephone no. ▶ (414) 905-1000
Located at ▶ 100 E Wisconsin Ave, Suite 1900 Milwaukee WI ZIP+4 ▶ 53202-4125

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

			Yes	No
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?	16		X
	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 ▶			

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
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.)	2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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.)*	3b	N/A	
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 2014?	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)? . . . . **5b** N/A

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? ☐ 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** No: 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? . **7b** N/A

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(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
Stephen H. Marcus 100 E Wisconsin Ave Milwaukee, WI 53202	Pres/Dir/TR as Req	0		
Gegory S. Marcus 100 E Wisconsin Ave Milwaukee, WI 53202	Dir as Req'd	0		
Thomas F. Kissinger 100 E Wisconsin Ave Milwaukee, WI 53202	Sec/Dir as Req'd	0		

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). 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 . . . . ▶

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

3 Five highest-paid independent contractors for professional services (see instructions). 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 ▶		

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 United Way of Greater Milwaukee - Community involvement in supporting numerous charitable causes.	113,000
2 Milwaukee Symphony Orchestra - Community involvement in supporting the arts/culture.	75,000
3 Marquette University - Community betterment through education.	40,000
4 UPAF (United Performing Arts Fund) - Community involvement in supporting the arts/culture.	34,000

Part IX-B **Summary of Program-Related Investments** (see instructions)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,582,200
b	Average of monthly cash balances	1b	27,479
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	2,609,679
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	2,609,679
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see instructions)	4	39,145
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,570,534
6	**Minimum investment return.** Enter 5% of line 5	6	128,527

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	128,527
2a	Tax on investment income for 2014 from Part VI, line 5	2a	4,019		
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	4,019
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	124,508
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	124,508
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	124,508

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	656,503
b	Program-related investments—total from Part IX-B	1b	
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	656,503
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 (see instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	656,503

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

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1	Distributable amount for 2014 from Part XI, line 7				124,508
2	Undistributed income, if any, as of the end of 2014:				
a	Enter amount for 2013 only			0	
b	Total for prior years: 20___, 20___, 20___				
3	Excess distributions carryover, if any, to 2014:				
a	From 2009 — 715,176				
b	From 2010 — 763,959				
c	From 2011 — 705,332				
d	From 2012 — 600,235				
e	From 2013 — 643,254				
f	**Total** of lines 3a through e	3,427,956			
4	Qualifying distributions for 2014 from Part XII, line 4: ▶ $ 656,503				
a	Applied to 2013, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see instructions)				
c	Treated as distributions out of corpus (Election required—see instructions)				
d	Applied to 2014 distributable amount				124,508
e	Remaining amount distributed out of corpus	531,995			
5	Excess distributions carryover applied to 2014. *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	3,959,951			
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				
d	Subtract line 6c from line 6b. Taxable amount—see instructions				
e	Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount—see instructions			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)				
8	Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	715,176			
9	**Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a	3,244,775			
10	Analysis of line 9:				
a	Excess from 2010 — 763,959				
b	Excess from 2011 — 705,332				
c	Excess from 2012 — 600,235				
d	Excess from 2013 — 643,254				
e	Excess from 2014 — 531,995				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling . . . . . ▶

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

	Tax year	Prior 3 years			
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a					0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					0
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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

1 Information Regarding Foundation Managers:

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

None

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

None

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

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

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

The Marcus Corporation Foundation Attn S Marcus 100 E Wisconsin Ave Milwaukee, WI 53202

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

Written request indicating name, address, objectives and reason for the request.

c Any submission deadlines:

None

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

None

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				623,503
Total ▶ 3a				623,503
b *Approved for future payment*				
Total ▶ 3b				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	15,448	
4 Dividends and interest from securities			14	59,371	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	140,359	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		215,178	0

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 215,178

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions)
	N/A

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

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

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

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

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

Signature of officer or trustee | Date: 5/13/2015 | Title: Secretary

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN

Firm's name ▶ | Firm's EIN ▶

Firm's address ▶ | Phone no

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

Schedule of Contributors

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**

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

OMB No 1545-0047

2014

Name of the organization	Employer identification number
Marcus Corporation Foundation, Inc	39-6046268

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 331/3 % 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).

Name of organization	Employer identification number
Marcus Corporation Foundation, Inc	39-6046268

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	The Marcus Corporation 100 E Wisconsin Ave Milwaukee WI 53202-4125 Foreign State or Province: Foreign Country:	$ 745,753	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
	Foreign State or Province: Foreign Country:	$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
	Foreign State or Province: Foreign Country:	$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
	Foreign State or Province: Foreign Country:	$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
	Foreign State or Province: Foreign Country:	$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
	Foreign State or Province: Foreign Country:	$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

The Marcus Corporation Foundation
100 E. Wisconsin Avenue, Suite 1900
Milwaukee, WI 53202-4125

FEIN #39-6046268

Attachment To Form 990-PF For 2014
Page 2, Part II, Lines 10a - 10c

	Book Value	Fair Market Value
Part II, Line 10b:		
BMO LGM EMERGING MARKETS EQUITY I	39,630	37,723
BMO SMALL-CAP GROWTH FUND CLASS I	21,784	36,559
BMO SMALL-CAP VALUE FUND CLASS I	36,571	39,564
CREDIT SUISSE COMMODITY RETURN STRATEGY I	20,730	15,671
DODGE & COX INTERNATIONAL STOCK FUND	44,004	61,431
HARBOR INTERNATIONAL FUND #11	54,959	64,870
MFS VALUE FUND	68,035	98,707
OAKMARK INTERNATIONAL FUND	59,437	61,583
T ROWE PRICE GROWTH STOCK FUND	149,729	205,497
VANGUARD EQUITY INCOME FUND	142,596	155,475
VANGUARD INSTITUTIONAL INDEX FUND	700,433	886,468
VANGUARD MID CAP INDEX FUND	197,776	216,855
VANGUARD REIT INDEX FUND	19,606	23,702
VANGUARD SMALL-CAP VALUE INDEX FUND	19,440	26,994
Total Investments-corporate stock	**1,574,728**	**1,931,100**
Part II, Line 10c:		
BAIRD CORE PLUS BOND FUND	360,654	360,647
BMO TCH CORE PLUS BOND FUND CLASS I	330,683	374,045
PIMCO INVESTMENT GRADE CORPORATE BOND FUND	52,015	49,438
VANGUARD SHORT-TERM INVESTMENT GRADE FUND	251,103	250,235
Total Investments-corporate bonds	**994,454**	**1,034,365**

The Marcus Corporation Foundation
100 E. Wisconsin Avenue, Suite 1900
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Attachment To Form 990-PF For 2014
Page 2, Part II, Line 13, Investments - Other

State of Israel Jubilee Bond, Series A	2.52%	125,000.00
State of Israel Jubilee Bond, Series A	2.26%	125,000.00
State of Israel Jubilee Bond, Series A	2.20%	125,000.00
State of Israel Jubilee Bond, Series A	2.26%	125,000.00
State of Israel Jubilee Bond, Series A	2.70%	125,000.00
		625,000.00

The Marcus Corporation Foundation
100 E. Wisconsin Avenue, Suite 1900
Milwaukee, WI 53202-4125

FEIN #39-6046268

Attachment To Form 990-PF For 2014
Page 3, Part IV, Line 1a - SALE OF INVESTMENTS - SHORT-TERM

Description	How Acquired	Date Acquired	Date Sold	Gross Sale Price	Cost	Wash Sale Loss Disallowed	Gain or (Loss)
09658L596 BMO SMALL-CAP VALUE FUND CLASS I	P	8/8/2013	4/16/2014	2,708	2,653	-	55
09658L596 BMO SMALL-CAP VALUE FUND CLASS I	P	8/25/2014	12/30/2014	8,672	9,108	-	(436)
09658L596 BMO SMALL-CAP VALUE FUND CLASS I	P	Various	12/30/2014	2,994	3,128	134	-
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	1/31/2014	4/1/2014	776	769	-	7
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	Various	4/1/2014	1,710	1,713	3	-
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	Various	9/3/2014	28,649	28,466	-	183
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	8/29/2014	9/3/2014	488	489	1	-
552983694 MFS VALUE FUND-I	P	8/21/2013	4/1/2014	17,905	16,074	-	1,830
552983694 MFS VALUE FUND-I	P	8/21/2013	7/8/2014	8,793	7,673	-	1,120
552983694 MFS VALUE FUND-I	P	Various	12/30/2014	29,936	28,835	-	1,100
741479109 PRICE T ROW GROWTH STOCK FUND INC	P	8/21/2013	5/12/2014	6,385	5,463	-	922
741479109 PRICE T ROW GROWTH STOCK FUND INC	P	8/21/2013	5/15/2014	11,098	9,670	-	1,428
741479109 PRICE T ROW GROWTH STOCK FUND INC	P	8/21/2013	7/8/2014	8,155	6,672	-	1,483
921921300 VANGUARD EQUITY INCOME-AD	P	4/1/2014	7/9/2014	1,685	1,612	-	73
922031836 VANGUARD FIXED INCOME SECS FD SHORT TERM CORP FD ADMIRAL SHS	P	8/15/2014	8/25/2014	29,535	29,590	55	-
922040100 VANGUARD INSTL INDEX FD SH BEN INT	P	5/16/2014	7/9/2014	3,303	3,149	-	154
922908835 VANGUARD MID CAP INDEX FD CL I #864	P	4/1/2014	7/9/2014	6,185	5,976	-	209
922908835 VANGUARD MID CAP INDEX FD CL I #864	P	Various	12/30/2014	39,177	37,951	-	1,225
921908836 VANGUARD REIT INDEX FUND-SIG	P	Various	4/1/2014	1,428	1,176	-	252
Total				**209,581**	**200,166**	**192**	**9,607**

The Marcus Corporation Foundation
100 E. Wisconsin Avenue, Suite 1900
Milwaukee, WI 53202-4125

FEIN #39-6046268

Attachment To Form 990-PF For 2014
Page 3, Part IV, Line 1a - SALE OF INVESTMENTS - LONG-TERM

Description	How Acquired	Date Acquired	Date Sold	Gross Sale Price	Cost	Wash Sale Loss Disallowed	Gain or (Loss)
04314H709 ARTISAN MID CAP VALUE FD-INV	P	Various	5/12/2014	21,183	13,662	-	7,521
04314H709 ARTISAN MID CAP VALUE FD-INV	P	3/6/2008	7/8/2014	2,553	1,563	-	990
04314H709 ARTISAN MID CAP VALUE FD-INV	P	Various	8/12/2014	48,498	26,625	-	21,873
09658L489 BMO LGM EMERGING MARKETS EQUITY I	P	2/6/2013	4/16/2014	4,227	4,489	-	(262)
09658L737 BMO MID-CAP GROWTH FUND CLASS I	P	4/7/2009	4/1/2014	48,467	22,008	-	26,459
09658L737 BMO MID-CAP GROWTH FUND CLASS I	P	Various	4/1/2014	3,477	2,945	-	532
09658L711 BMO MID-CAP VALUE FUND CLASS I	P	Various	4/1/2014	52,470	30,963	-	21,507
09658L620 BMO SMALL-CAP GROWTH FUND CLASS I	P	3/6/2008	5/12/2014	18,456	11,723	-	6,733
09658L620 BMO SMALL-CAP GROWTH FUND CLASS I	P	3/6/2008	5/15/2014	10,234	6,647	-	3,587
09658L620 BMO SMALL-CAP GROWTH FUND CLASS I	P	Various	7/8/2014	5,211	3,066	-	2,144
09658L596 BMO SMALL-CAP VALUE FUND CLASS I	P	3/25/2013	4/16/2014	3,012	2,758	-	254
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	3/6/2008	4/1/2014	4,228	3,923	-	305
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	Various	4/1/2014	857	882	25	-
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	6/16/2012	9/3/2014	406	405	-	1
09658L885 BMO TCH CORE PLUS BOND FUND CLASS I	P	Various	9/3/2014	475	483	8	-
22544R305 CREDIT SUISSE COMM RET ST-I	P	1/4/2013	4/1/2014	1,037	1,081	-	(44)
722005816 PIMCO INVESTMENT GRD CORP-IN	P	8/24/2012	7/8/2014	618	642	-	(24)
81063U503 SCOUT INTERNATIONAL FUND	P	Various	4/16/2014	20,270	14,245	-	6,025
880208400 TEMPLETON GLOBAL BOND FUND-AD	P	Various	4/16/2014	20,193	21,268	-	(1,075)
880208400 TEMPLETON GLOBAL BOND FUND-AD	P	Various	11/4/2014	43,794	45,134	-	(1,339)
880208400 TEMPLETON GLOBAL BOND FUND-AD	P	7/31/2012	11/4/2014	6,935	6,872	-	63
Total				316,599	221,382	33	95,250

The Marcus Corporation Foundation
100 E. Wisconsin Avenue, Suite 1900
Milwaukee, WI 53202-4125

FEIN #39-6046268

Attachment To Form 990-PF For 2014
Part XV, Item 3a

Code for Sorting
1 Education
2 Health
3 Art/Culture
4 Conservation
5 Development

Name	Expenditure	Relationship	Status	Purpose	Code
AIDS Resourse Center of WI	140	N/A	Public	Health	2
Alpha Phi Alpha Delta Chi Lamda Foundation	500	N/A	Public	Development	5
ALS Association	1,000	N/A	Public	Health	2
Alverno College	10,000	N/A	Public	Education	1
American Heart Association	4,000	N/A	Public	Health	2
American Liver Foundation - WI Chapter	1,625	N/A	Public	Health	2
American Lung Association	1,250	N/A	Public	Health	2
American Red Cross	7,500	N/A	Public	Health	2
Archdiocese of Milwaukee	1,000	N/A	Public	Education	1
Arthritis Foundation - Wisconsin	2,500	N/A	Public	Health	2
Association for Women Lawyers	375	N/A	Public	Education	1
Association of Fundraising Professionals	675	N/A	Public	Development	5
Autism Society of WI	1,250	N/A	Public	Health	2
Barbara Sinatra Children's Center	10,000	N/A	Public	Health	2
Bel Cantos Chorus	875	N/A	Public	Art/Culture	3
Best Buddies of Wisconsin	2,500	N/A	Public	Health	2
Betty Brinn Children's Museum	7,500	N/A	Public	Education	1
Big Brothers Big Sisters Milwaukee/Waukesha	1,500	N/A	Public	Education	1
Boy Scouts of America	3,750	N/A	Public	Development	5
Boy Scouts Potawatomi Area Council	1,000	N/A	Public	Development	5
Boys & Girls Club	5,200	N/A	Public	Development	5
Brewers Community Foundation	25,000	N/A	Public	Development	5
Children's Hospital & Health System Foundation	25,200	N/A	Public	Health	2
COA - Formerly Children's Outing Association	5,000	N/A	Public	Development	5
Coalition for Children Youth Families	750	N/A	Public	Health	2
College of Desert Foundation	10,000	N/A	Public	Education	1
Columbia St Mary's Hospital	250	N/A	Public	Health	2
Cortney's Place	2,000	N/A	Public	Education	1
Creative Alliance Milwaukee	5,000	N/A	Public	Education	1
Discovery World at Pier WI	2,250	N/A	Public	Development	5
Donald Driver Foundation	2,500	N/A	Public	Development	5
Easter Seal Society of Wisconsin, Inc	240	N/A	Public	Health	2
Economic Wisconsin	300	N/A	Public	Education	1
Fellowship Open	500	N/A	Public	Development	5
First Stage Milwaukee Children's Theater	1,500	N/A	Public	Art/Culture	3
Grand Ave Club Milaukee County	1,750	N/A	Public	Development	5
Great Lakes Hemophilia	1,610	N/A	Public	Health	2
Greater Milwaukee Committee	5,300	N/A	Public	Development	5
Harvard Business School of Wisconsin	750	N/A	Public	Development	5
Hispanic Chamber of Commerce	500	N/A	Public	Development	5
Hispanic Professionals of Greater Milwaukee	5,000	N/A	Public	Education	1
Horizon Home Care and Hospice	1,000	N/A	Public	Health	2
Jewish Community Center Milwaukee	1,500	N/A	Public	Development	5
Jewish Family Services	2,500	N/A	Public	Health	2
Junior Achievement of Wisconsin	2,500	N/A	Public	Development	5
Juvenile Diabetes Research Foundation	1,750	N/A	Public	Health	2
Keep Greater Milwaukee Beautiful, Inc	750	N/A	Public	Development	5
LISC Milwaukee	1,000	N/A	Public	Development	5
Literacy Service of Milwaukee	750	N/A	Public	Education	1
Lutheran Home Foundation	1,250	N/A	Public	Health	2
Make A Wish Foundation	15,600	N/A	Public	Health	2
March of Dimes	1,000	N/A	Public	Development	5
Marcus Center For The Performing Arts	3,750	N/A	Public	Art/Culture	3

The Marcus Corporation Foundation
100 E. Wisconsin Avenue, Suite 1900
Milwaukee, WI 53202-4125

FEIN #39-6046268

Attachment To Form 990-PF For 2014
Part XV, Item 3a

Code for Sorting
1 Education
2 Health
3 Art/Culture
4 Conservation
5 Development

Name	Expenditure	Relationship	Status	Purpose	
Marquette University	40,000	N/A	Public	Education	1
Medical College of Wisconsin	3,700	N/A	Public	Education	1
Menomonee Valley Partners, Inc	5,000	N/A	Public	Development	5
Metropolitan Milwaukee Assoc of Commerce	225	N/A	Public	Education	1
Milwaukee Art Museum	3,800	N/A	Public	Art/Culture	3
Milwaukee Ballet	2,500	N/A	Public	Art/Culture	3
Milwaukee College Prep School	1,000	N/A	Public	Education	1
Milwaukee County Sheriff's Office	250	N/A	Public	Development	5
Milwaukee Downtown	3,245	N/A	Public	Art/Culture	3
Milwaukee Institute Art & Design	1,500	N/A	Public	Art/Culture	3
Milwaukee Jazz Vision	500	N/A	Public	Art/Culture	3
Milwaukee Jewish Federation	2,500	N/A	Public	Conservation	4
Milwaukee Press Club	5,000	N/A	Public	Development	5
Milwaukee Public Library Foundation	100	N/A	Public	Development	5
Milwaukee Repertory Theatre	3,375	N/A	Public	Art/Culture	3
Milwaukee Symphony Orchestra	75,000	N/A	Public	Art/Culture	3
MPTV Fund	100	N/A	Public	Development	5
NAACP	1,000	N/A	Public	Development	5
National Kidney Foundation of Wisconsin	750	N/A	Public	Health	2
Nehemiah Project, Inc.	7,500	N/A	Public	Health	2
Positive Programs for the Family	500	N/A	Public	Health	2
Professional Dimensions	875	N/A	Public	Education	1
Public Policy Forum	550	N/A	Public	Development	5
Rock the Green, Inc.	(2,500)	N/A	Public	Art/Culture	3
Ruth Helf Family Center	500	N/A	Public	Education	1
Service Club of Milwaukee	250	N/A	Public	Development	5
Sharp Literacy, Inc. (formerly Creative Sharp Presentation)	1,000	N/A	Public	Education	1
Spirit of Greater Madison	2,000	N/A	Public	Development	5
St. Francis Children's Center	1,000	N/A	Public	Health	2
Stand Up to Cancer	25,000	N/A	Public	Health	2
Summerfest Foundation, Inc.	5,000	N/A	Public	Art/Culture	3
Susan G Komen for the Cure - SE Wisconsin	500	N/A	Public	Health	2
Team Jack Foundation	2,227	N/A	Public	Health	2
Teen Challenge	500	N/A	Public	Health	2
TEMPO	3,000	N/A	Public	Education	1
Timber-Lee Christian Center	500	N/A	Public	Education	1
United Community Center	5,000	N/A	Public	Development	5
United Way Greater Milwaukee	113,000	N/A	Public	Health	2
United Way of Lincoln & Lancaster County	2,226	N/A	Public	Health	2
University of Wisconsin Foundation	1,500	N/A	Public	Education	1
UPAF (United Performing Arts Fund)	34,000	N/A	Public	Art/Culture	3
US Holocaust Museum	1,200	N/A	Public	Conservation	4
UW Madison Business	20,000	N/A	Public	Education	1
UWM Business Admin	20,000	N/A	Public	Education	1
UWM-School of Education	1,500	N/A	Public	Education	1
UW Stout	1,000	N/A	Public	Education	1
Variety - The Children's Charity of Wisconsin	750	N/A	Public	Health	2
VCRT Macarthur Forum, Inc	900	N/A	Public	Development	5
Vince Lombardi Charitable Funds	4,240	N/A	Public	Health	2
Vision Forward Association (Former Badger Assoc)	5,000	N/A	Public	Health	2
Waukesha County Action Network	2,800	N/A	Public	Development	5
WI Conservatory of Music	3,000	N/A	Public	Art/Culture	3
WI DECA	2,500	N/A	Public	Education	1

The Marcus Corporation Foundation
100 E. Wisconsin Avenue, Suite 1900
Milwaukee, WI 53202-4125

FEIN #39-6046268

Attachment To Form 990-PF For 2014
Part XV, Item 3a

Name	Expenditure	Relationship	Status	Purpose	Code for Sorting 1 Education 2 Health 3 Art/Culture 4 Conservation 5 Development
WI Historical Foundation, Inc.	1,000	N/A	Public	Development	5
WI Humane Society	1,500	N/A	Public	Education	1
Wilson Center for the Arts	3,500	N/A	Public	Art/Culture	3
WI Restaurant Association	1,050	N/A	Public	Education	1
Wheaton Franciscan Heatlhcare Foundation	750	N/A	Public	Health	2
Woman's Club of Wisconsin Foundation	250	N/A	Public	Development	5
Zoological Society	6,000	N/A	Public	Development	5
TOTAL	**623,503**				