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EXTENDED TO NOVEMBER 15, 2016

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2015 or tax year beginning

, and ending

Name of foundation

ANNE AND PAUL MARCUS FAMILY FOUNDATION

A Employer identification number

01-6220476

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

Room/suite

B Telephone number

260 FRANKLIN STREET

6TH FL

617 556 5200

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

BOSTON, MA 02110

C If exemption application is pending, check here ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE 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)

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify)F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

\$ 2,918,842. (Part I, column (d) must be on cash basis.)

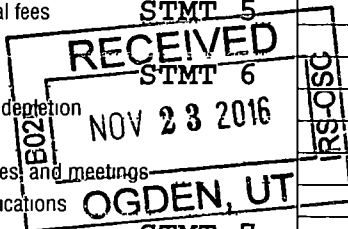
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		1,162,337.			
2 Check ☐ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		145.	145.	145.	STATEMENT 2
4 Dividends and interest from securities		14,095.	13,877.	14,095.	STATEMENT 3
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		4,791.			STATEMENT 1
b Gross sales price for all assets on line 6a 589,940.					
7 Capital gain net income (from Part IV, line 2)			133,239.		
8 Net short-term capital gain				0.	
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		1,181,368.	147,261.	14,240.	
13 Compensation of officers, directors, trustees, etc		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		10,020.	5,010.	5,010.	5,010.
c Other professional fees STMT 5		106,050.	0.	0.	106,050.
17 Interest					
18 Taxes STMT 6		3,018.	3,018.	3,018.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		8,882.	1,248.	1,062.	7,634.
24 Total operating and administrative expenses. Add lines 13 through 23		127,970.	9,276.	9,090.	118,694.
25 Contributions, gifts, grants paid		1,427,987.			1,427,987.
26 Total expenses and disbursements. Add lines 24 and 25		1,555,957.	9,276.	9,090.	1,546,681.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-374,589.			
b Net investment income (if negative, enter -0-)			137,985.		
c Adjusted net income (if negative, enter -0-)				5,150.	

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LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2015)

SCANNED NOV 29 2016



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		2,636,483.	2,629,845.	2,629,845.
	3	Accounts receivable ▶ 543.				
		Less: allowance for doubtful accounts ▶		1,087.	543.	543.
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 8		625,942.	277,163.	233,003.
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 9		75,960.	57,332.	55,451.	
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		3,339,472.	2,964,883.	2,918,842.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐				
		and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ ☒				
		and complete lines 27 through 31				
	27	Capital stock, trust principal, or current funds		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		3,339,472.	2,964,883.	
30	Total net assets or fund balances		3,339,472.	2,964,883.		
31	Total liabilities and net assets/fund balances		3,339,472.	2,964,883.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	3,339,472.
2	Enter amount from Part I, line 27a	2	-374,589.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,964,883.
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	2,964,883.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENT				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e 589,940.		456,701.	133,239.	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e			133,239.	
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		2 133,239.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		3 -11,990.

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))
2014	734,435.	3,177,064.	.231168
2013	621,543.	2,973,115.	.209054
2012	407,703.	2,500,286.	.163063
2011	1,098,740.	3,298,996.	.333053
2010	1,463,905.	3,654,484.	.400578
2 Total of line 1, column (d)			2 1.336916
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 .267383
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5			4 3,286,242.
5 Multiply line 4 by line 3			5 878,685.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,380.
7 Add lines 5 and 6			7 880,065.
8 Enter qualifying distributions from Part XII, line 4 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.			8 1,546,681.

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)		1	1,380.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	1,380.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	1,380.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a	3,052.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	5,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	8,052.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	6,672.	
11 Enter the amount of line 10 to be: Credited to 2016 estimated tax ☒ 6,672. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 2015 or the taxable year beginning in 2015 (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

STMT 10

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)		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)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14 The books are in care of ► THE CORPORATION Telephone no. ► 617 556 5200 Located at ► 260 FRANKLIN STREET, NO. 6TH FL, BOSTON, MA ZIP+4 ► 02110		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year		
16 At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
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 2015?		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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ► b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No b If "Yes," did it have excess business holdings in 2015 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 2015) N/A		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2015?		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

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

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

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

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

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

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

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

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

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

0

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	505,722.
b	Average of monthly cash balances	1b	2,830,564.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	3,336,286.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	3,336,286.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	50,044.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,286,242.
6	Minimum investment return. Enter 5% of line 5	6	164,312.

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	
2a	Tax on investment income for 2015 from Part VI, line 5	2a	
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,546,681.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,546,681.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	1,380.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,545,301.

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)

N/A

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only				
b Total for prior years:				
3 Excess distributions carryover, if any, to 2015:				
a From 2010				
b From 2011				
c From 2012				
d From 2013				
e From 2014				
f Total of lines 3a through e				
4 Qualifying distributions for 2015 from Part XII, line 4: ► \$				
a Applied to 2014, 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 2015 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see instructions				
e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr.				
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				
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 2010 not applied on line 5 or line 7				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2011				
b Excess from 2012				
c Excess from 2013				
d Excess from 2014				
e Excess from 2015				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, 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)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

3 Subtract line 2d from line 2c

Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

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)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Tax year	Prior 3 years				(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
	5,150.	19,945.	35,143.	11,671.	71,909.
	4,378.	16,953.	29,872.	9,920.	61,123.
	1,546,681.	734,435.	621,543.	407,703.	3,310,362.
	1,452,702.	694,511.	481,498.	251,938.	2,880,649.
	93,979.	39,924.	140,045.	155,765.	429,713.
					0.
					0.
	109,541.	105,902.	99,104.	83,343.	397,890.
					0.
					0.
					0.
					0.

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**1 Information Regarding Foundation Managers:**

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

SEE STATEMENT 11

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

NONE**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

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

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

SEE STATEMENT 12

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

c Any submission deadlines:

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
EXCEPTIONAL LIVES 77 HEATH STREET BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	UNRESTRICTED	284,000.
BIG BROTHER BIG SISTER OF MASSACHUSETTS BAY 75 FEDERAL STREET BOSTON, MA 02110	NONE	PUBLIC CHARITY	UNRESTRICTED	1,000.
SCITUATE RECREATION DEPARTMENT 600 CHIEF JUSTICE CUSHING HWY SCITUATE, MA 02066	NONE	PUBLIC CHARITY	UNRESTRICTED	200.
BOSTON ARTS ACADEMY 174 IPSWICH STREET BOSTON, MA 02215	NONE	PUBLIC CHARITY	UNRESTRICTED	1,000.
DISABLITY RIGHTS FUND 89 SOUTH STREET, SUITE 203 BOSTON, MA 02111	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
Total SEE CONTINUATION SHEET(S)				1,427,987.
b Approved for future payment				
NONE				
Total				0.

▶ 3a

▶ 3b

Part XVII

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

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

[illegible]

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

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

**Sign
Here**

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

Signature of officer or trustee

Don R. MARTIN TRUSTEE

Date _____

ii	ii	2016
----	----	------

Title

TRUSTEE

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

☒ Yes ☐ No**Paid
Preparer
Use Only**

Print/Type preparer's name

SCOTT FRENCH

Preparer's signature

Date	
------	--

11/9/14

Check ☐ if self-employed

PTIN

P01402520

Firm's name ► **GIARDINA & FRENCH CPAS, LLC**

Firm's EIN ► 46-1307047

Firm's address ► 33 BROAD STREET, 5TH FL
BOSTON, MA 02109

Phone no. **617-720-5520**

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	RECEPTOS INC COM 279 SHRS	D		01/06/15
b	SPD GOLD TR GOLD SHS	P		12/03/15
c	ZAYO GROPU HLDGS INC.COM 4591 SHRS	D		10/01/15
d	ACCELERON PHARMA.COM 1276 SHRS	D		01/06/15
e	NATIONAL FINANCIAL SERVICES 8997 S/T	P		
f	NATIONAL FINANCIAL SERVICES 8997 S/T	P		
g	NATIONAL FINANCIAL SERVICES 8997 L/T	P		
h	POWERSHARES DB AGRICULTURE S/T 1256	P		
i	POWERSHARES DB AGRICULTURE L/T 1256	P		
j	POWERSHARES DB OIL S/T 1256	P		
k	POWERSHARES DB OIL L/T 1256			
l	US BRENT OIL FUND S/T 1256			
m	US BRENT OIL FUND L/T 1256			
n	CAPITAL GAINS DIVIDENDS			
o				

(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 34,747.		2,846.	31,901.
b 250.		364.	-114.
c 114,653.		8,998.	105,655.
d 48,607.		53,299.	-4,692.
e 151,276.		156,022.	-4,746.
f 5.		4.	1.
g 239,617.		217,056.	22,561.
h		3,061.	-3,061.
i		4,591.	-4,591.
j		2,282.	-2,282.
k		3,422.	-3,422.
l		1,902.	-1,902.
m		2,854.	-2,854.
n 785.			785.
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			31,901.
b			-114.
c			105,655.
d			-4,692.
e			** -4,746.
f			** 1.
g			22,561.
h			** -3,061.
i			-4,591.
j			** -2,282.
k			-3,422.
l			** -1,902.
m			-2,854.
n			785.
o			

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	133,239.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	-11,990.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ST FRANCIS HOUSE WHOLE HEALTH CLINIC 39 BOYLSTON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	UNRETRACTED	500.
HOSPICE OF KONA PO BOX 4130 KAILUA-KONA, HI 96745	NONE	PUBLIC CHARITY	UNRESTRICTED	500.
FIRST PARISH OF BROOKLINE 382 WALNUT STREET BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	UNRESTRICTED	1,000.
NF NORTHEAST 9 BEDFORD STREET BURLINGTON, MA 01803	NONE	PUBLIC CHARITY	UNRESTRICTED	250.
DANA FARBER MARATHON CHALLENGE 10 BROOKLINE PLACE WEST, 6TH FLOOR BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	UNRESTRICTED	250.
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVE BOSTON, MA 02115	NONE	PUBLIC CHARITY	TRANSLATIONAL NEUROSCIENCE CENTER	60,000.
THE BASE 11 WALNUT PARK ROXBURY, MA 02119	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
AUTISM CONSORTIUM 260 FRANKLIN STREET BOSTON, MA 02110	NONE	PUBLIC CHARITY	UNRESTRICTED	51,562.
BEST BUDDIES CHALLENGE 45 BROOMFIELD STREET, 7TH FLOOR BOSTON, MA 02108	NONE	PUBLIC CHARITY	UNRESTRICTED	1,250.
MASSACHUSETTS INSTITUTE OF TECHNOLOGY - WHITEHEAD INSTITUTE NINE CAMBRIDGE CENTER CAMBRIDGE, MA 02142	NONE	PUBLIC CHARITY	WHITEHEAD INSTITUTE	2,500.
Total from continuation sheets				1,131,787.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AANE 51 WATER STREET, SUITE 206 WATERTOWN, MA 02472	NONE	PUBLIC CHARITY	UNRESTRICTED	500.
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 77 MASSACHUSETTS AVE CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	MARCUS FELLOWSHIP FUND - NORMAN B LEVENTHAL CENTER FOR ADVANCED URBANISM	500,000.
FROM THE TOP 295 HUNTINGTON AVE, SUITE 20 BOSTON, MA 02115	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
DANA FARBER CANCER INSTITUTE 450 BROOKLINE AVE BOSTON, MA 02215	NONE	PUBLIC CHARITY	SUSAN F SMITH CENTER FOR WOMEN'S CANCERS	2,500.
THE PARK SCHOOL 171 GODDARD AVENUE BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	SUMMER AT THE PARK	8,000.
NATIONAL CENTER ON TIME AND LEARNING 24 SCHOOL STREET, 3RD FLOOR BOSTON, MA 02108	NONE	PUBLIC CHARITY	1647 TEAM	2,500.
CAMP JABBERWOCKY PO BOX 1357 VINEYARD HAVEN, MA 02568	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
LESLEY UNIVERSITY 29 EVERETT ST CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	THRESHOLD PROGRAM	55,000.
CONCORD ACADEMY 166 MAIN STREET CONCORD, MA 01742	NONE	PUBLIC CHARITY	ANNUAL FUND	70,000.
AKBTC FOUNDATION 98 RANDOM FARMS DRIVE CHAPPAQUA, NY 10514	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CITY YEAR 287 COLUMBUS AVENUE BOSTON, MA 02116	NONE	PUBLIC CHARITY	UNRESTRICTED	1,000.
STRIVE 217 W 18TH STREET, #208 NEW YORK, NY 10011	NONE	PUBLIC CHARITY	UNRESTRICTED	600.
PAN MASS CHALLENGE 77 4TH AVENUE NEEDHAM, MA 02494	NONE	PUBLIC CHARITY	UNRESTRICTED	10,500.
MBHP 125 LINCOLN STREET BOSTON, MA 02111	NONE	PUBLIC CHARITY	FOUNDERS CELEBRATION	500.
THE COREY C GRIFFIN CHARITABLE FOUNDATION 205 NEWBURY STREET, SUITE 410 FRAMINGHAM, MA 01701	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
THE CYSTIC FIBROSIS FOUNDATION 220 NORTH MAIN STREET, SUITE 104 NATICK, MA 01760	NONE	PUBLIC CHARITY	THE JOEY FUND	2,500.
BRIDGE BOSTON FOUNDATION 2 MCLELLAN STREET DORCHESTER, MA 02121	NONE	PUBLIC CHARITY	CAPITAL CAMPAIGN - \$50,000, ANNUAL FUND \$10,000 ANNUAL FUND - \$10,000	60,000.
NATIONAL BRAIN TUMOR SOCIETY 55 CHAPEL STREET, SUITE 200 NEWTON, MA 02458	NONE	PUBLIC CHARITY	UNRESTRICTED	250.
FAMILIES FIRST 99 BISHIP RICHARD ALLEN DRIVE CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
RETTSYNDROME.ORG PO BOX 706143 CINCINNATI, OH 45270	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE BASE 11 WALNUT PARK ROXBURY, MA 02119	NONE	PUBLIC CHARITY	UNRESTRICTED	6,000.
DEAN COLLEGE 99 MAIN STREET FRANKLIN, MA 02038	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 77 MASSACHUSETTS AVE, 46-3160 CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	MCGOVERN INSTITUTE FOR BRAIN RESEARCH	1,500.
THE DANE ESTATE AT PINE MANOR COLLEGE 400 HEATH STREET CHESTNUT HILL, MA 02467	NONE	PUBLIC CHARITY	UNRESTRICTED	2,000.
THE CHILDREN'S TRUST, INC. 55 COURT STREET, 4TH FLOOR BOSTON, MA 02108	NONE	PUBLIC CHARITY	UNRESTRICTED	2,000.
MIDDLEBRIDGE SCHOOL 333 OCEAN ROAD NARRAGANSETT, RI 02882	NONE	PUBLIC CHARITY	UNRESTRICTED	1,500.
HARVARD UNIVERSITY 14 STORY STREET, SUITE 100 CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	ADVANCED LEADERSHIP INITIATIVE	15,000.
BRIGHAM AND WOMEN'S HOSPITAL 116 HUNTINGTON AVENUE, 3RD FLOOR BOSTON, MA 02116	NONE	PUBLIC CHARITY	WOMEN'S HEALTH FUND	500.
CONCORD ACADEMY 166 MAIN STREET CONCORD, MA 01742	NONE	PUBLIC CHARITY	ANNUAL FUND	10,000.
COMMON IMPACT 50 MILK STREET BOSTON, MA 02109	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AFL-AMERICAN FRIENDS OF LIBI 420 HARVARD STREET BROOKLINE, MA 02446	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
BROTHERS FOR LIFE 270 SOUTH HANFORD STREET SEATTLE, WA 98134	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
FULL FRAME INITIATIVE 308 MAIN STREET, SUITE 2A GREENFIELD, MA 01301	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
ONE DEGREE 2370 MARKET STREET, SUITE 162 SAN FRANCISCO, CA 94114	NONE	PUBLIC CHARITY	UNRESTRICTED	2,500.
METROMORPHOSIS 4242 GOVERNMENT ST, SUITE 103 BATON ROUGE, LA 70806	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
FRIENDS OF FOUNDATION DE FRANCE 275 MADISON AVE., 6TH FLOOR NEW YORK, NY 10016	NONE	PUBLIC CHARITY	UNRESTRICTED	10,000.
AARP FOUNDATION PO BOX 93207 LONG BEACH, CA 90809	NONE	PUBLIC CHARITY	UNRESTRICTED	5,000.
TEL AVIV-YAFO FOUNDATION 1201 BROADWAY, SUITE 802 NEW YORK, NY 10001	NONE	PUBLIC CHARITY	BIALIK-ROGOZIN SCHOOL	10,000.
UNIVERSITY OF MASSACHUSETTS MEMORIAL FOUNDATION 333 SOUTH STREET SHREWSBURY, MA 02545	NONE	PUBLIC CHARITY	FUNDING OF FAMILY SUPPORT NETWORK	18,000.
BOSTON CHILDREN'S HOSPITAL TRUST 401 PARK DRIVE, SUITE 602 BOSTON, MA 02215	NONE	PUBLIC CHARITY	FUNDING OF FAMILY SUPPORT NETWORK	18,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BOSTON MEDICAL CENTER 88 EAST NEWTON STREET, ROOM 421 BOSTON, MA 02118	NONE	PUBLIC CHARITY	FUNDING OF FAMILY SUPPORT NETWORK	18,000.
TUFTS MEDICAL CENTER TRUST 800 WASHINGTON STREET, BOX 231 BOSTON, MA 02111	NONE	PUBLIC CHARITY	FUNDING OF FAMILY SUPPORT NETWORK	18,000.
MASSACHUSETTS GENERAL HOSPITAL 125 NASHUA STREET, SUITE 540 BOSTON, MA 02114	NONE	PUBLIC CHARITY	FUNDING OF FAMILY SUPPORT NETWORK	18,000.
BOSTON CHILDREN'S HOSPITAL TRUST 401 PARK DRIVE BOSTON, MA 02215	NONE	PUBLIC CHARITY	CONFERENCE EXPENSE - \$31,625 MUSTAFA SAHIN LEADERSHIP - \$25,000	56,625.
Total from continuation sheets				

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

2015

Name of the organization

ANNE AND PAUL MARCUS FAMILY FOUNDATION

Employer identification number

01-6220476

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck 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) (2015)

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

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ANNE AND PAUL MARCUS 77 HEATH STREET BROOKLINE, MA 02445	\$ 1,000,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
2	ANNE AND PAUL MARCUS 77 HEATH STREET BROOKLINE, MA 02445	\$ 48,526.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
3	ANNE AND PAUL MARCUS 77 HEATH STREET BROOKLINE, MA 02445	\$ 113,811.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization

Employer identification number

ANNE AND PAUL MARCUS FAMILY FOUNDATION**01-6220476****Part II Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>2</u>	<u>MARKETABLE SECURITIES - STOCKS</u>	\$ <u>48,526.</u>	<u>01/19/15</u>
<u>3</u>	<u>MARKETABLE SECURITIES - STOCKS</u>	\$ <u>113,811.</u>	<u>09/29/15</u>
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____

Name of organization

Employer identification number

ANNE AND PAUL MARCUS FAMILY FOUNDATION**01-6220476****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. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(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 . GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
RECEPTOS INC COM 279 SHRS	DONATED		01/06/15

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
34,747.	31,254.	0.	0.	3,493.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
SPD GOLD TR GOLD SHS	PURCHASED		12/03/15

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
250.	364.	0.	0.	-114.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
ZAYO GROPU HLDGS INC.COM 4591 SHRS	DONATED		10/01/15

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
114,653.	113,811.	0.	0.	842.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
ACCELERON PHARMA.COM 1276 SHRS				DONATED		01/06/15
	48,607.	48,526.	0.	DEPREC.	0.	81.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINANCIAL SERVICES 8997 S/T				PURCHASED		
	151,276.	156,022.	0.	DEPREC.	0.	-4,746.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINANCIAL SERVICES 8997 S/T				PURCHASED		
	5.	4.	0.	DEPREC.	0.	1.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
NATIONAL FINANCIAL SERVICES 8997 L/T				PURCHASED		
	239,617.	217,056.	0.	DEPREC.	0.	22,561.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
POWERSHARES DB AGRICULTURE S/T 1256	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	3,061.	0.	0.	-3,061.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
POWERSHARES DB AGRICULTURE L/T 1256	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	4,591.	0.	0.	-4,591.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
POWERSHARES DB OIL S/T 1256	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	2,282.	0.	0.	-2,282.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
POWERSHARES DB OIL L/T 1256	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	3,422.	0.	0.	-3,422.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
US BRENT OIL FUND S/T 1256	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	1,902.	0.	0.	-1,902.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
US BRENT OIL FUND L/T 1256	PURCHASED			
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	2,854.	0.	0.	-2,854.

CAPITAL GAINS DIVIDENDS FROM PART IV	785.
TOTAL TO FORM 990-PF, PART I, LINE 6A	4,791.

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
NATIONAL FINANCIAL SERVICES	126.	126.	126.
POWERSHARES DB AGRICULTURE FUND	9.	9.	9.
POWERSHARES DB OIL FUND	3.	3.	3.
US BRENT OIL FUND	7.	7.	7.
TOTAL TO PART I, LINE 3	145.	145.	145.

FORM 990-PF.	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	3
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
NATIONAL FINANCIAL SERVICES	7,249.	283.	6,966.	6,966.	6,966.
NATIONAL FINANCIAL SERVICES	7,631.	502.	7,129.	6,911.	7,129.
TO PART I, LINE 4	14,880.	785.	14,095.	13,877.	14,095.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	10,020.	5,010.	5,010.	5,010.
TO FORM 990-PF, PG 1, LN 16B	10,020.	5,010.	5,010.	5,010.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTANTS	106,050.	0.	0.	106,050.
TO FORM 990-PF, PG 1, LN 16C	106,050.	0.	0.	106,050.

FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	18.	18.	18.	0.
FEDERAL EXCISE TAX	3,000.	3,000.	3,000.	0.
TO FORM 990-PF, PG 1, LN 18	3,018.	3,018.	3,018.	0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE FILING FEES	250.	0.	0.	250.
INVESTMENT EXPENSES	1,062.	1,062.	1,062.	0.
SUPPLIES AND OFFICE DELIVERY	372. 14.	186. 0.	0. 0.	186. 14.
CONFERENCES AND MEETINGS	6,584.	0.	0.	6,584.
TRAVEL	600.	0.	0.	600.
TO FORM 990-PF, PG 1, LN 23	8,882.	1,248.	1,062.	7,634.

FORM 990-PF	CORPORATE STOCK		STATEMENT 8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
FIDELITY INVESTMENTS 472433	0.	0.	
FIDELITY INVESTMENTS 168997	277,163.	233,003.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	277,163.	233,003.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
POWERSHARES DB AGRICULTURE FUND	COST	40,730.	39,509.
POWERSHARES DB OIL FUND	COST	8,319.	8,598.
US BRENT OIL FUND	COST	8,283.	7,344.
TOTAL TO FORM 990-PF, PART II, LINE 13		57,332.	55,451.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	10
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NAME OF CONTRIBUTOR	ADDRESS
PAUL AND ANNE MARCUS	77 HEATH STREET BROOKLINE, MA 02445

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	11
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NAME OF MANAGER
ANNE P MARCUS
PAUL R MARCUS

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT 12
	PART XV, LINES 2A THROUGH 2D	

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

PAUL MARCUS
260 FRANKLIN STREET
BOSTON, MA 02110

TELEPHONE NUMBER	NAME OF GRANT PROGRAM
617 556-5200	NONE

FORM AND CONTENT OF APPLICATIONS

LETTER OUTLINING NEED AND USE OF FUNDS

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION FAVORS PROGRAMS BENEFITING CHILDREN

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ANNE MARCUS
260 FRANKLIN STREET
BOSTON, MA 02110

<u>TELEPHONE NUMBER</u>	<u>NAME OF GRANT PROGRAM</u>
617 556-5200	NONE

FORM AND CONTENT OF APPLICATIONS

LETTER OUTLINING NEED AND USE OF FUNDS

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION FAVORS PROGRAMS BENEFITING CHILDREN