

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](http://www.irs.gov/form990pf)

OMB No. 1545-0052

2016

Open to Public Inspection

1710

For calendar year 2016 or tax year beginning NOV 1, 2016, and ending OCT 31, 2017

Name of foundation

THE NANCY LURIE MARKS FAMILY FOUNDATION

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

60 WILLIAM STREET, SUITE 110

A Employer identification number

04-2607232

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

WELLESLEY, MA 02481

G Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name changeH Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundationI Fair market value of all assets at end of year **J Accounting method:**  Cash  Accrual  
(from Part II, col. (c), line 16)  Other (specify) **► \$ 123,055,307.** (Part I, column (d) must be on cash basis)

B Telephone number

617-482-1776

C If exemption application is pending, check here ► **b**D 1. Foreign organizations, check here ► **b**2. Foreign organizations meeting the 8596 test, check here and attach computation ► **b**E If private foundation status was terminated under section 507(b)(1)(A), check here ► **b**F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► **b****Part II Analysis of Revenue and Expenses**  
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	991,570.	989,719.		STATEMENT 2
4	Dividends and interest from securities	1,392,322.	1,392,151.		STATEMENT 3
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	4,962,954.			STATEMENT 1
b	Gross sales price for all assets on line 6a	4,962,954.			
7	Capital gain net income (from Part IV, line 2)		4,961,629.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	561,042.	628,951.		STATEMENT 4
12	<b>Total.</b> Add lines 1 through 11	7,907,888.	7,972,450.		
13	Compensation of officers, directors, trustees, etc	750,912.	0.		750,912.
14	Other employee salaries and wages	382,879.	0.		382,879.
15	Pension plans, employee benefits	117,797.	0.		117,797.
16a	Legal fees	STMT 5	15,966.	0.	15,966.
b	Accounting fees	STMT 6	26,608.	0.	26,608.
c	Other professional fees	STMT 7	1,304,429.	1,297,280.	0.
17	Interest				
18	Taxes	STMT 8	250,003.	49,194.	0.
19	Depreciation and depletion		14,266.	0.	
20	Occupancy		191,373.	0.	191,373.
21	Travel, conferences, and meetings		2,145.	0.	2,145.
22	Printing and publications				
23	Other expenses	STMT 9	155,232.	0.	155,232.
24	<b>Total operating and administrative expenses.</b> Add lines 13 through 23		3,211,610.	1,346,474.	1,642,912.
25	Contributions, gifts, grants paid		3,798,817.		3,798,817.
26	<b>Total expenses and disbursements.</b> Add lines 24 and 25		7,010,427.	1,346,474.	5,441,729.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements		897,461.		
b	Net investment income (if negative, enter -0-)			6,625,976.	
c	Adjusted net income (if negative, enter -0-)				N/A

632

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
			3,320,142.	6,397,023.	6,397,023.
Assets	1 Cash - non-interest-bearing				
	2 Savings and temporary cash investments				
	3 Accounts receivable ►				
	Less: allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less: allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ►				
	Less: allowance for doubtful accounts ►				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock	STMT 11	107,355,928.	104,765,104.	116,646,453.
	c Investments - corporate bonds				
Liabilities	11 Investments - land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
	12 Investments - mortgage loans				
	13 Investments - other				
	14 Land, buildings, and equipment basis ►	750,416.			
	Less accumulated depreciation	STMT 12 ►	738,585.	10,761.	11,831.
	15 Other assets (describe ► )				
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		110,686,831.	111,173,958.	123,055,307.
	17 Accounts payable and accrued expenses				
	18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ► )				
	23 Total liabilities (add lines 17 through 22)		0.	0.	
	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds		110,686,831.	111,173,958.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds		0.	0.	
	30 Total net assets or fund balances		110,686,831.	111,173,958.	
	31 Total liabilities and net assets/fund balances		110,686,831.	111,173,958.	

## 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)	1 110,686,831.
2 Enter amount from Part I, line 27a	2 897,461.
3 Other increases not included in line 2 (itemize) ► RETURNED CONTRIBUTIONS	3 114,939.
4 Add lines 1, 2, and 3	4 111,699,231.
5 Decreases not included in line 2 (itemize) ►	5 525,273.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6 111,173,958.

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a K-1S			P	VARIOUS	VARIOUS
b OTHER ENTITY			P	VARIOUS	VARIOUS
c OFFSHORE			P	VARIOUS	VARIOUS
d CHESTNUT HEDGE FUND			P	VARIOUS	VARIOUS
e					
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 4,897,767.			1,325.	4,896,442.	
b <791,963.>				<791,963.>	
c 1,019,943.				1,019,943.	
d <162,793.>				<162,793.>	
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			
a		1		4,896,442.	
b				<791,963.>	
c				1,019,943.	
d				<162,793.>	
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	4,961,629.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8			3	N/A	

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

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))
2015	6,728,002.	115,272,402.	.058366
2014	6,087,307.	120,107,121.	.050682
2013	6,655,578.	118,808,075.	.056020
2012	5,274,662.	108,541,451.	.048596
2011	3,889,509.	100,366,605.	.038753

2 Total of line 1, column (d)

2 .252417

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 .050483

4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5

4 116,759,337.

5 Multiply line 4 by line 3

5 5,894,362.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 66,260.

7 Add lines 5 and 6

7 5,960,622.

8 Enter qualifying distributions from Part XII, line 4

8 5,966,729.

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

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2016 estimated tax payments and 2015 overpayment credited to 2016

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax. Check here  if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be: Credited to 2017 estimated tax ► 377,850. | Refunded ► 0.

1	66,260.
2	0.
3	66,260.
4	0.
5	66,260.
6a	444,110.
6b	
6c	
6d	
7	444,110.
8	
9	
10	377,850.
11	0.

**Part VII-A Statements Regarding Activities**

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?

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities

c Did the foundation file Form 1120-POL for this year?

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

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

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

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

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?

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

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

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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

	Yes	No
1a	X	
1b	X	
1c	X	
2	X	
3	X	
4a	X	
4b	X	
5	X	
6	X	
7	X	
8b	X	
9	X	
10	X	

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

11	Yes	No
11	<input checked="" type="checkbox"/>	
12	Yes	No
12	<input checked="" type="checkbox"/>	
13	Yes	No
13	<input checked="" type="checkbox"/>	
14	Telephone no.	617-482-1776
14	Located at	► 400 ATLANTIC AVE. BOSTON, MA
14	ZIP+4	► 02110
15	► 15	N/A
16	Yes	No
16	<input checked="" type="checkbox"/>	

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)

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)

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A

14 The books are in care of ► GOULSTON & STORRS Telephone no. ► 617-482-1776 Located at ► 400 ATLANTIC AVE. 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 ► 15 N/A

16 At any time during calendar year 2016, 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 ► 16 N/A

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

1a	Yes	No
1a	<input checked="" type="checkbox"/>	
(1)	Yes	No
(1)	<input checked="" type="checkbox"/>	
(2)	Yes	No
(2)	<input checked="" type="checkbox"/>	
(3)	Yes	No
(3)	<input checked="" type="checkbox"/>	
(4)	Yes	No
(4)	<input checked="" type="checkbox"/>	
(5)	Yes	No
(5)	<input checked="" type="checkbox"/>	
(6)	Yes	No
(6)	<input checked="" type="checkbox"/>	
b	Yes	No
b	<input checked="" type="checkbox"/>	
c	Yes	No
c	<input checked="" type="checkbox"/>	
2	Yes	No
2	<input checked="" type="checkbox"/>	
a	Yes	No
a	<input checked="" type="checkbox"/>	
b	Yes	No
b	<input checked="" type="checkbox"/>	
c	Yes	No
c	<input checked="" type="checkbox"/>	
3a	Yes	No
3a	<input checked="" type="checkbox"/>	
b	Yes	No
b	<input checked="" type="checkbox"/>	
4a	Yes	No
4a	<input checked="" type="checkbox"/>	
b	Yes	No
b	<input checked="" type="checkbox"/>	

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

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 ► 1b

c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? ► 1c

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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?  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.) ► 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. ► \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

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 2016 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 2016) ► 3b N/A

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  Yes  No

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 2016? ► 4b

**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))?

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

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

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

(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 Yes  No Yes  No Yes  No 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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13		750,912.	40,612.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ELEONORA SILAYEVA - C/O NLM FOUNDATION, 60 WILLIAMS ST,	EXECUTIVE ASSOCIATE FOR ADMINISTRAT 40.00	99,941.	27,215.	0.
ELIZABETH ZWICK - C/O NLM FOUNDATION, 60 WILLIAMS ST,	DIRECTOR OF COMMUNITY RELATIONS & P 40.00	101,500.	22,855.	0.
JUDITH CHAN - C/O NLM FOUNDATION, 60 WILLIAMS ST, WELLESLEY, MA	DIRECTOR OF COMMUNICATIONS & PROGRA 40.00	95,975.	27,115.	0.

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

►

0

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

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET, BOSTON, MA 02110	INVESTMENT ADVISORY FEES	192,693.
GOULSTON & STORRS 400 ATLANTIC AVE, BOSTON, MA 02110	CUSTODIAL & LEGAL FEES	132,857.
KENNETH M. FARBER - C/O NLM FOUNDATION, 60 WILLIAMS ST, WELLESLEY, MA	CONSULTING	75,140.

Total number of others receiving over \$50,000 for professional services ► 0

**Part IX-A | Summary of Direct Charitable Activities**

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

**1 NOT APPLICABLE**

1	0.
2	
3	
4	

**Part IX-B | Summary of Program-Related Investments**

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

**1 INVESTMENT IN STEMINA BIOMARKER DISCOVERY, INC. TO PARTIALLY FUND SCIENTIFIC RESEARCH ON AUTISM DONE BY THE COMPANY.**

525,000.

2	
3	

All other program-related investments. See instructions.

3	
Total. Add lines 1 through 3 ►	525,000.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	
a	Average monthly fair market value of securities	1a 113,898,870.
b	Average of monthly cash balances	1b 4,638,528.
c	Fair market value of all other assets	1c
d	<b>Total</b> (add lines 1a, b, and c)	1d 118,537,398.
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	3 118,537,398.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 1,778,061.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5 116,759,337.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6 5,837,967.

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

1	Minimum investment return from Part X, line 6	1 5,837,967.
2a	Tax on investment income for 2016 from Part VI, line 5	2a 66,260.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b
c	Add lines 2a and 2b	2c 66,260.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 5,771,707.
4	Recoveries of amounts treated as qualifying distributions	4 114,939.
5	Add lines 3 and 4	5 5,886,646.
6	Deduction from distributable amount (see instructions)	6 0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7 5,886,646.

**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 5,441,729.
b	Program-related investments - total from Part IX-B	1b 525,000.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2
3	Amounts set aside for specific charitable projects that satisfy the:	
a	Suitability test (prior IRS approval required)	3a
b	Cash distribution test (attach the required schedule)	3b
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4 5,966,729.
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 66,260.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6 5,900,469.

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				5,886,646.
2 Undistributed income, if any, as of the end of 2016			0.	
a Enter amount for 2015 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016.				
a From 2011				
b From 2012				
c From 2013	818,712.			
d From 2014	454,702.			
e From 2015	1,146,067.			
f Total of lines 3a through e	2,419,481.			
4 Qualifying distributions for 2016 from Part XII, line 4: ► \$ 5,966,729.			0.	
a Applied to 2015, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount	80,083.			5,886,646.
e Remaining amount distributed out of corpus	0.			0.
5 Excess distributions carryover applied to 2016 (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	2,499,564.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.		0.		
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017		0.		0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	2,499,564.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013	818,712.			
c Excess from 2014	454,702.			
d Excess from 2015	1,146,067.			
e Excess from 2016	80,083.			



## 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)				
<i>a Paid during the year</i>				
SEE ATTACHED SCHEDULE	NONE	PUBLIC CHARITY	SEE ATTACHED SCHEDULE	3,798,817.
<b>Total</b>				► 3a 3,798,817.
<i>b Approved for future payment</i>				
BETH ISRAEL DEACONESS MEDICAL CENTER 330 BROOKLINE AVENUE BOSTON 02215	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	985,556.
HARVARD MEDICAL SCHOOL 25 SHATTUCK ST BOSTON 02115	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	100,000.
MAINE MEDICAL CENTER 22 BRAMHALL STREET PORTLAND 04102	NONE	PUBLIC CHARITY	MEDICAL RESEARCH	245,761.
<b>Total</b>	SEE CONTINUATION SHEET(S)			► 3b 2,788,426.

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514	(e) Related or exempt function income
	(a) Business code	(b) 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	900000	1,851. 14	991,570.	
4 Dividends and interest-from-securities	900000	171. 14	1,392,322.	
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	900000	<67,909.> 18	561,042.	
8 Gain or (loss) from sales of assets other than inventory	900000	1,325. 14	4,962,954.	
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)	*      *      *	<64,562.> * * *	7,907,888.	0.
13 Total. Add line 12, columns (b), (d), and (e)			13	7,843,326.
(See worksheet in line 13 instructions to verify calculations.)				

## **Relationship of Activities to the Accomplishment of Exempt Purposes**



## THE NANCY LURIE MARKS FAMILY FOUNDATION

04-2607232

## Part XV Supplementary Information

### 3 Grants and Contributions Approved for Future Payment (Continuation)

FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT 1

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
	PURCHASED	VARIOUS			
K-1S					
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
	4,897,767.	0.	0.	0.	4,897,767.

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
	PURCHASED	VARIOUS			
OTHER ENTITY					
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
	<791,963.>	0.	0.	0.	<791,963.>

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
	PURCHASED	VARIOUS			
OFFSHORE					
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
	1,019,943.	0.	0.	0.	1,019,943.

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
	PURCHASED	VARIOUS			
CHESTNUT HEDGE FUND					
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
	<162,793.>	0.	0.	0.	<162,793.>

CAPITAL GAINS DIVIDENDS FROM PART IV

0.

TOTAL TO FORM 990-PF, PART I, LINE 6A

4,962,954.

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CHESTNUT HEDGE FUND	4,599.	4,599.	
FIDELITY	3,920.	3,920.	
TOTAL INTEREST FROM K-1S	983,051.	981,200.	
TOTAL TO PART I, LINE 3	991,570.	989,719.	

FORM 990-PF

DIVIDENDS AND INTEREST FROM SECURITIES

STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CHESTNUT HEDGE FUND	44,291.	0.	44,291.	44,291.	
TOTAL DIVIDENDS FROM K-1S	1,230,571.	0.	1,230,571.	1,230,400.	
TOTAL DIVIDENDS FROM OTHER ENTITIES	117,460.	0.	117,460.	117,460.	
TO PART I, LINE 4	1,392,322.	0.	1,392,322.	1,392,151.	

THE NANCY LURIE MARKS FAMILY FOUNDATION

04-2607232

FORM 990-PF

OTHER INCOME

STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME FROM K-1S	522,440.	590,349.	
CHESTNUT HEDGE FUND	38,373.	38,373.	
LITIGATION SETTLEMENT	229.	229.	
TOTAL TO FORM 990-PF, PART I, LINE 11	561,042.	628,951.	

STATEMENT(S) 4

## THE NANCY LURIE MARKS FAMILY FOUNDATION

04-2607232

FORM 990-PF

LEGAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GOULSTON & STORRS	15,966.	0.		15,966.
TO FM 990-PF, PG 1, LN 16A	15,966.	0.		15,966.

STATEMENT (S) 5

THE NANCY LURIE MARKS FAMILY FOUNDATION

04-2607232

FORM 990-PF

ACCOUNTING FEES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DELOITTE TAX LLP	26,608.	0.		26,608.
TO FORM 990-PF, PG 1, LN 16B	26,608.	0.		26,608.

STATEMENT(S) 6

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
K-1S	880,995.	873,846.		0.
CHESTNUT HEDGE FUND	108,042.	108,042.		0.
OTHER ENTITY	315,392.	315,392.		0.
TO FORM 990-PF, PG 1, LN 16C	1,304,429.	1,297,280.		0.

FORM 990-PF

TAXES

STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAXES PAID	200,000.	0.		0.
FOREIGN TAXES PAID	49,943.	49,194.		0.
MA PC FEE	60.	0.		0.
TO FORM 990-PF, PG 1, LN 18	250,003.	49,194.		0.

## THE NANCY LURIE MARKS FAMILY FOUNDATION

04-2607232

FORM 990-PF	OTHER EXPENSES	STATEMENT 9		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOOKS & SUBSCRIPTIONS	4,692.	0.		4,692.
CLEANING SERVICES	6,669.	0.		6,669.
CONSULTING	84,463.	0.		84,463.
INSURANCE	13,860.	0.		13,860.
MAIL	467.	0.		467.
OFFICE EXPENSES	8,378.	0.		8,378.
OFFICE EXPENSES/SUPPLIES	8,389.	0.		8,389.
PROGRAM DEVELOPMENT	13,044.	0.		13,044.
UTILITIES	15,270.	0.		15,270.
TO FORM 990-PF, PG 1, LN 23	155,232.	0.		155,232.

THE NANCY LURIE MARKS FAMILY FOUNDATION

04-2607232

FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 10

DESCRIPTION	AMOUNT
ADJUSTMENT TO CORRECT PRIOR BOOK BALANCES	273.
ADJUSTMENT FOR PROGRAM RELATED INVESTMENTS	525,000.
TOTAL TO FORM 990-PF, PART III, LINE 5	<u>525,273.</u>

STATEMENT(S) 10

THE NANCY LURIE MARKS FAMILY FOUNDATION

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FORM 990-PF

CORPORATE STOCK

STATEMENT 11

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CHESTNUT HEDGE FUND	5,835,985.	4,955,221.
K-1S	74,396,616.	87,925,479.
OFFSHORE	14,439,242.	13,537,627.
OTHER ENTITY	10,093,261.	10,228,126.
TOTAL TO FORM 990-PF, PART II, LINE 10B	104,765,104.	116,646,453.

## FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 12

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FURNITURE	11,952.	11,951.	1.
COMPUTER	13,214.	13,213.	1.
LEASEHOLD IMPROVEM	2,436.	2,411.	25.
FURNITURE	3,559.	3,520.	39.
EQUIPMENT	5,302.	5,302.	0.
OFFICE EQUIPMENT	16,741.	16,209.	532.
ARCHITECT	2,178.	2,109.	69.
LEASEHOLD IMPROVEM	11,833.	11,833.	0.
LEASEHOLD IMPROVEM	405.	405.	0.
EQUIPMENT	9,828.	9,828.	0.
EQUIPMENT	19,629.	19,629.	0.
EQUIPMENT	13,773.	13,773.	0.
FURNITURE	3,471.	3,471.	0.
LEASEHOLD IMPROVEM	12,182.	12,182.	0.
COMPUTER	15,821.	15,821.	0.
FURNITURE	291.	291.	0.
COMPUTER	2,480.	2,399.	81.
COMPUTER MONITOR	2,180.	2,109.	71.
COMPUTER EQUIPMENT	3,468.	3,468.	0.
FURNITURE	950.	950.	0.
FURNITURE	1,275.	1,275.	0.
OFFICE EQUIPMENT	30,048.	30,048.	0.
COMPUTER EQUIPMENT	10,955.	10,955.	0.
EQUIPMENT	887.	886.	1.
LCD MONITOR	719.	719.	0.
EQUIPMENT	3,452.	3,452.	0.
HARD DRIVE	245.	245.	0.
FURNITURE	3,258.	3,258.	0.
LEASEHOLD IMPROV.	630.	629.	1.
LEASEHOLD IMPROV.	1,508.	1,508.	0.
COMPUTER EQUIPMENT	95,520.	95,520.	0.
COMPUTER EQUIPMENT	42,977.	42,977.	0.
FURNITURE	208,166.	208,165.	1.
FURNITURE	31,261.	31,261.	0.
FURNITURE	23,396.	23,396.	0.
COMPUTER EQUIPMENT	14,855.	14,855.	0.
FURNITURE	53,761.	53,760.	1.
FURNITURE	7,703.	7,703.	0.
FURNITURE	13,219.	13,219.	0.
FURNITURE	14,369.	13,956.	413.
FURNITURE	10,060.	9,191.	869.
FURNITURE	6,369.	5,044.	1,325.
FURNITURE	8,753.	6,652.	2,101.
FURNITURE	5,809.	3,320.	2,489.
COMPUTER	9,527.	5,717.	3,810.
<b>TOTAL TO FM 990-PF, PART II, LN 14</b>	<b>750,415.</b>	<b>738,585.</b>	<b>11,830.</b>

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 13

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CATHY J. LURIE C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE  1.00	0.	0.	0.
JEFFREY R. LURIE C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE  1.00	0.	0.	0.
MARK D. BALK C/O GOULSTON & STORRS, 400 ATLANTIC AVENUE BOSTON, MA 02110	TRUSTEE  1.00	0.	0.	0.
HARVEY E. CUSHING C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE  20.00	153,000.	0.	0.
NANCY L. MARKS C/O GOULSTON & STORRS, 400 ATLANTIC AVE BOSTON, MA 02110	TRUSTEE  1.00	0.	0.	0.
RICHARD B. DENNING C/O NLM FOUNDATION, 60 WILLIAMS ST. WELLESLEY, MA 02481	TRUSTEE  15.00	167,208.	9,193.	0.
CLARENCE SCHUTT C/O NLM FOUNDATION, 60 WILLIAMS ST. WELLESLEY, MA 02481	DIRECTOR  40.00	430,704.	31,419.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		750,912.	40,612.	0.

2016 DEPRECIATION AND AMORTIZATION REPORT

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Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation	
1	FURNITURE	06/01/96	2000DB	7.00	HY17	11,952.				11,952.	11,951.		0.	11,951.	
2	COMPUTER	06/01/96	2000DB	5.00	HY17	13,214.				13,214.	13,213.		0.	13,213.	
3	LEASEHOLD IMPROVEM	06/01/97	2000DB	7.00	HY17	2,436.				2,436.	2,411.		0.	2,411.	
4	FURNITURE	06/01/97	2000DB	7.00	HY17	3,559.				3,559.	3,526.		0.	3,526.	
5	EQUIPMENT	06/01/97	2000DB	5.00	HY17	5,302.				5,302.	5,302.		0.	5,302.	
6	OFFICE EQUIPMENT	09/15/97	2000DB	7.00	HY17	16,741.				16,741.	16,209.		0.	16,209.	
7	ARCHITECT										2,178.	2,109.		0.	2,109.
8	LEASEHOLD IMPROVEM	05/01/98	2000DB	7.00	HY17	11,833.				11,833.	11,833.		0.	11,833.	
9	LEASEHOLD IMPROVEM	12/01/97	2000DB	7.00	HY17	405.				405.	405.		0.	405.	
10	EQUIPMENT	01/01/98	2000DB	5.00	HY17	9,828.				9,828.	9,828.		0.	9,828.	
11	EQUIPMENT	06/01/98	2000DB	5.00	HY17	19,629.				19,629.	19,629.		0.	19,629.	
12	EQUIPMENT	09/01/98	2000DB	5.00	HY17	13,773.				13,773.	13,773.		0.	13,773.	
13	FURNITURE	12/01/97	2000DB	7.00	HY17	3,471.				3,471.	3,471.		0.	3,471.	
14	LEASEHOLD IMPROVEM	03/01/98	2000DB	7.00	HY17	12,182.				12,182.	12,182.		0.	12,182.	
15	COMPUTER	04/01/99	2000DB	5.00	HY17	15,821.				15,821.	15,821.		0.	15,821.	
16	FURNITURE										291.	291.		0.	291.
17	COMPUTER	10/25/00	2000DB	5.00	HY17	2,480.				2,480.	2,399.		0.	2,399.	
18	COMPUTER MONITOR	09/29/00	2000DB	5.00	HY17	2,180.				2,180.	2,109.		0.	2,109.	

## 2016 DEPRECIATION AND AMORTIZATION REPORT

## FORM 990-PF PAGE 1

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Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Of Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Year Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
19	COMPUTER EQUIPMENT	02/28/00	200DB	5.00	HY17	3,468.				3,468.	3,468.		0.	3,468.
20	FURNITURE	08/06/01	200DB	7.00	HY17	950.				950.	950.		0.	950.
21	FURNITURE	06/21/01	200DB	7.00	HY17	1,275.				1,275.	1,275.		0.	1,275.
22	OFFICE EQUIPMENT	04/26/01	200DB	5.00	HY17	30,048.				30,048.	30,048.		0.	30,048.
23	COMPUTER EQUIPMENT	07/23/01	200DB	5.00	HY17	10,955.				10,955.	10,955.		0.	10,955.
24	EQUIPMENT	05/21/01	200DB	5.00	HY17	887.				887.	886.		0.	886.
25	LCD MONITOR	03/18/02	200DB	5.00	HY17	719.				719.	719.		0.	719.
26	EQUIPMENT	05/06/02	200DB	5.00	HY17	3,452.				3,452.	3,452.		0.	3,452.
27	HARD DRIVE	06/26/02	200DB	5.00	HY17	245.				245.	245.		0.	245.
28	FURNITURE	05/01/03	200DB	7.00	HY17	3,258.				3,258.	3,258.		0.	3,258.
29	LEASEHOLD IMPROV.	11/08/02	200DB	7.00	HY17	630.				630.	629.		0.	629.
30	LEASEHOLD IMPROV.	03/14/03	200DB	7.00	HY17	1,508.				1,508.	1,508.		0.	1,508.
31	COMPUTER EQUIPMENT	05/01/04	200DB	5.00	HY17	95,520.				47,760.	47,760.		0.	47,760.
32	COMPUTER EQUIPMENT	05/01/05	200DB	5.00	HY17	42,977.				42,977.	42,977.		0.	42,977.
33	FURNITURE	05/01/06	200DB	7.00	HY17	208,166.				208,166.	208,165.		0.	208,165.
34	FURNITURE	05/01/07	200DB	7.00	HY17	31,261.				31,261.	31,261.		0.	31,261.
35	FURNITURE	05/01/08	200DB	7.00	HY17	23,396.				11,698.	11,698.		0.	11,698.
36	COMPUTER EQUIPMENT	04/01/09	200DB	5.00	HY17	14,855.				7,448.	7,427.		0.	7,427.

2016 DEPRECIATION AND AMORTIZATION REPORT

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Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Year Deduction	Current Sec 179 Expense	Ending Accumulated Depreciation
37	FURNITURE	05/01/10	200DB	7.00	HY17	53,761.			26,881.	26,880.	25,680.		1,199.	26,879.
38	FURNITURE	07/01/11	200DB	5.00	HY17	7,701.				7,703.			0.	
39	FURNITURE	11/15/11	200DB	5.00	HY17	13,219.				13,219.			0.	
40	FURNITURE	01/15/13	200DB	5.00	HY17	14,365.				7,185.	5,943.		828.	6,771.
41	FURNITURE	05/15/14	200DB	5.00	HY17	10,060.				5,030.	5,030.		579.	4,161.
42	FURNITURE	02/27/15	200DB	5.00	HY17	6,369.				3,185.	3,184.		637.	1,859.
43	FURNITURE	04/01/16	200DB	5.00	HY17	8,753.				4,376.	4,377.		875.	2,276.
46	FURNITURE	06/02/17	200DB	7.00	HY19C	5,809.				2,905.	2,904.		3,320.	415.
51	COMPUTER	06/09/17	200DB	5.00	HY19B	9,527.				4,764.	4,763.		5,717.	953.
	* TOTAL 990-PF PG 1 DEPR					750,415.				142,134.	608,281.	589,854.	14,266.	596,451.
	CURRENT YEAR ACTIVITY													
	BEGINNING BALANCE													
	ACQUISITIONS													
	DISPOSITIONS													
	ENDING BALANCE													
	ENDING ACCUM DEPR													
	ENDING BOOK VALUE													

628111 04-01-16

(D) - Asset disposed

\* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

**NANCY LURIE MARKS FAMILY FOUNDATION**  
**CHARITABLE CONTRIBUTIONS**  
November 1, 2016 - October 31, 2017

Recipient	Relationship	Status	Purpose	Amount
1 ACCESS RECREATION BOSTON	NONE	501(c)(3)	Public Welfare	\$ 1,225 00
2 ASSOCIATED GRANT MAKERS	NONE	501(c)(3)	Public Welfare	\$ 50 00
3 ASPERGER'S ASSOCIATION	NONE	501(c)(3)	Medical Research	\$ 1,000.00
4 ASSOCIATION OF DEVELOPMENTAL DISABILITIES PROVIDERS	NONE	501(c)(3)	Medical Research	\$ 1,228 80
5 AUTISM OF MASSACHUSETTS	NONE	501(c)(3)	Medical Research	\$ 50 00
6 AUTISM RESEARCH INSTITUTE	NONE	501(c)(3)	Medical Research	\$ 7,500 00
7 BETH ISRAEL DEACONESS MEDICAL CENTER	NONE	501(c)(3)	Medical Research	\$ 111,111 00
8 BOSTON JEWISH FILM FESTIVAL	NONE	501(c)(3)	Public Welfare	\$ 10,000 00
9 BOSTON CHILDREN'S HOSPITAL	NONE	501(c)(3)	Medical Research	\$ 529,100 00
10 BOSTON HEALTH CARE FOR THE HOMELESS PROGRAM	NONE	501(c)(3)	Public Welfare	\$ 10,000 00
11 BOSTON UNIVERSITY	NONE	501(c)(3)	Education	\$ 151,111 00
12 BRADLEY HOSPITAL	NONE	501(c)(3)	Medical Research	\$ 51,203 00
13 BRANDeIS UNIVERSITY	NONE	501(c)(3)	Education	\$ 200,000 00
14 CHRISTINE'S HOPE FOR KIDS	NONE	501(c)(3)	Public Welfare	\$ 250 00
15 CHURCH OF GOOD SHEPHERD	NONE	501(c)(3)	Religious	\$ 800 00
16 COLD SPRING HARBOR LABORATORY	NONE	501(c)(3)	Medical Research	\$ 39,000 00
17 EAGLES YOUTH PARTNERSHIP	NONE	501(c)(3)	Public Welfare	\$ 15,000 00
18 FACING HISTORY & OURSELVES	NONE	501(c)(3)	Cultural	\$ 5,000 00
19 FAMILY GUIDANCE CENTER	NONE	501(c)(3)	Public Welfare	\$ 50 00
20 FEINSTEIN INSTITUTE FOR MEDICAL RESEARCH	NONE	501(c)(3)	Medical Research	\$ 100,000 00
21 FRAXA RESEARCH FOUNDATION INC	NONE	501(c)(3)	Medical Research	\$ 25,000 00
22 GOLF FOR ALL	NONE	501(c)(3)	Public Welfare	\$ 55,922 00
23 HARVARD MEDICAL SCHOOL	NONE	501(c)(3)	Education	\$ 200,000 00
24 HEBREW COLLEGE	NONE	501(c)(3)	Education	\$ 52,750 00
25 HEBREW SENIOR LIFE	NONE	501(c)(3)	Public Welfare	\$ 5,000 00
26 INTERNATIONAL SOCIETY FOR AUTISM RESEARCH	NONE	501(c)(3)	Medical Research	\$ 10,000 00
27 JEWISH FEDERATION OF NORTH AMERICA	NONE	501(c)(3)	Religious	\$ 10,000 00
28 MAINE MEDICAL CENTER	NONE	501(c)(3)	Medical Research	\$ 483,082 00
29 MASSACHUSETTS ADVOCACY CENTER	NONE	501(c)(3)	Public Welfare	\$ 140,150 00
30 MASSACHUSETTS GENERAL HOSPITAL	NONE	501(c)(3)	Medical Research	\$ 474,488 00
31 MASSACHUSETTS INSTITUTE OF TECHNOLOGY	NONE	501(c)(3)	Education	\$ 391,085 50
32 MERWIN FREE CLINIC FOR ANIMALS	NONE	501(c)(3)	Medical	\$ 100 00
33 MSPCA	NONE	501(c)(3)	Medical	\$ 100 00
34 NEW ENGLAND YACHAD	NONE	501(c)(3)	Public Welfare	\$ 55,000 00
35 PLANNED PARENTHOOD	NONE	501(c)(3)	Public Welfare	\$ 100 00
36 PRINCETON PUBLIC LIBRARY FOUNDATION	NONE	501(c)(3)	Education	\$ 500 00
37 RUTGERS UNIVERSITY	NONE	501(c)(3)	Education	\$ 337,786 00
38 SALVATION ARMY	NONE	501(c)(3)	Public Welfare	\$ 100 00
39 SKYLIGHT CENTER	NONE	501(c)(3)	Public Welfare	\$ 50 00
40 STATE UNIVERSITY OF NEW YORK	NONE	501(c)(3)	Education	\$ 180,000 00
41 STEMINA BIOMARKER DISCOVERY, INC	NONE	Private Corporation	Medical Research	\$ 525,000 00
42 UNIVERSITY OF CALIFORNIA	NONE	501(c)(3)	Education	\$ 100,974 25
43 UNIVERSITY OF MASSACHUSETTS	NONE	501(c)(3)	Education	\$ 40,000 00
44 WATERTOWN COMMUNITY FOUNDATION	NONE	501(c)(3)	Public Welfare	\$ 100 00
45 YESHIVA UNIVERSITY	NONE	501(c)(3)	Education	\$ 350 00
46 ZENO MOUNTAIN FARM	NONE	501(c)(3)	Public Welfare	\$ 2,500 00
<b>Total</b>				<b>\$ 4,323,816 55</b>

STATEMENT