$\infty$ 

For calendar year 2017 or tax year beginning

Department of the Treasury

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. ► Go to www.irs.gov/Form990PF for instructions and the latest information

, 2017, and ending

OMB No 1545 0052

2017

Open to Public Inspection

| _MARC             | O FOUNDATION  |   |   | S6-0969412   | mber   |
|-------------------|---|---|---|--|--|
| 4431              | E. SUNSET DRIVE   |   |   | Telephone number (see ins  | · · · · · · · · · · · · · · · · · · ·  |
| PHOE              | NIX, AZ 85028   |   | -   | (480) 865-44   | 62 '   |
|                   |   |   |   | If exemption application is  | pending, check here 🕨 🗌  |
| G Che             | eck all that apply Initial return   | Initial return of a forr                    | ner public charity  | • 1 Foreign organizations, che   | ck here  |
|                   | Final return  | Amended return                              | '   | ,  |  |
|                   | · Address change  | Name change                                 |   | 2 Foreign organizations mee<br>here and attach computation   |  |
| H Che             |   | 1(c)(3) exempt private f                    |   | ·  |  |
| 1 500             | Section 4947(a)(1) nonexempt charitable   |   |   | E If private foundation statu<br>under section 507(b)(1)(A   |  |
|                   | market value of all assets at end of year  "">J Acc "" Part II, column (c), line 16)  | counting method XC Other (specify)          | <b>□</b>  |  |  |
| <b>►</b> \$       | 13, 323, 155. (Part I   | column (d) must be or                       |   | F If the foundation is in a 60<br>under section 507(b)(1)(B  |  |
| Part I            | Analysis of Revenue and   | (a) Revenue and                             | (b) Net investment  | (c) Adjusted net   | (d) Disbursements  |
|                   | <b>Expenses</b> (The total of amounts in columns (b); (c), and (d) may not neces-   | expenses per books                          | income  | income   | `for charitable  |
|                   | sarily equal the amounts in column (a)  |   | 1   | ,  | purposes<br>(cash basis only)  |
|                   | (see instructions))   |   | En a contrata de la colte de la describió de la colte | CO. Decreasing the Property of the control of the C | SERVED STATE OF THE STATE OF TH |
|                   | Contributions, gifts, grants, etc., received (attach schedule)     Check   X   if the foundation is not required to attach Sch. 8 | 100104P 6002T 1287 1297 1297 1297           |   |  |  |
|                   | Ι   | 2000 000 000 000 000 000 000 000 000 00     | MENDAN A TURBEN - DESERBER MER RUTTUK   | 23.4 Freehold & 2017 14 Concept 200 200  |  |
| •                 | 3 Interest on savings and temporary cash investments  | 0.50  | ,   |  |  |
|                   | 4 Dividends and interest from securities 5 a Gross rents.   | 250,916.                                    | 250,916   | ).   | 経験の対象を行うという。   |
|                   | b Net rental income or (loss)   |   |   |  | HARRISTON TO SELECTION OF THE PERSON OF THE  |
| Ř                 | 6 a Net gain or (loss) from sale of assets not on line 10   | 612,758.                                    |   |  | ######################################   |
| E<br>V            | b Gross sales price for all assets on line 6a 6, 792, 565.  | MARK TO SERVE                               |   | W.CX.JANOVYYCZOS   | は、できるかは、 では、 では、 では、 できる   |
| É                 | 7 Capital gain net income (from Part IV, line 2)  | 場等認識とれない。                                   | 612,758   |  | 経過数では、から、数数数   |
| . E<br>N<br>U     | Net short term capital gain     Income modifications  | 85574 K290 September 20                     |   | <u>0.</u>  |  |
| Ĕ                 | 10 a Gross sales less   |   |   | 7.45 146767.546.770 6.1745.146.795.246.  | CONTRACTOR TO THE CONTRACTOR OF THE CONTRACTOR O |
|                   | returns and allowances  |   |   |  |  |
|                   | b Less Cost of goods sold   |   |   |  | <b>WESSELSON</b>   |
|                   | C Gross profit or (loss) (attach schedule)  | 10000000000000000000000000000000000000      |   |  | 455422222  |
|                   | 11 Other income (attach schedule)   |   |   |  | MANAGE STATE OF THE STATE OF TH |
|                   | SEE STATEMENT 1   | 68,070.                                     | 31,083  |  | <b>《新聞》《新聞》</b> 《  |
|                   | 12 Total Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc.  | 931,744.                                    | 894,757   | 0.   | <b>经验收</b> 少公分别表。242-377   |
|                   | 141 Other employee salaries and wages   | 0.  |   |  |  |
| / ~               | 15 pension plans employee benefits  |   | •   |  |  |
| 12/A              | 16a Legal fees (attach schedule) SLL SI Z   | 610.  | 610   | ).   |  |
| 8<br> %<br> %     | No Accounting fees (attach 65) SEE ST 3   | . 4,390.                                    | 4,390   |  |  |
|                   | C. Other brolless (elifest (elifest ech) off of 4   | 142,433.                                    | . 142,433   | 3.   |  |
| P \$              | 17 Interest O SEE STM 5   |   |   |  | ·  |
| RR                | 18 Jazes (attach schedule (see Jases) SEE STM 5   | 66,298.                                     | 9,311   |  | SECOND CONTRACTOR OF THE PROPERTY OF THE PROPE |
| Ť Ť               | schedule) and depletion   |   |   |  |  |
| ž Ž               | 20 Occupancy  |   |   |  |  |
| G E               | 21 Travel, conferences, and meetings  |   |   |  |  |
| A E<br>N X<br>D P | 22 Printing and publications 23 Other expenses (attach schedule)  |   |   |  |  |
| Ė                 |   |   |   |  |  |
| N<br>S            | 24 Total operating and administrative   |   |   |  |  |
| Š                 | expenses, Add lines 13 through 23 25 Contributions, gifts, grants gaid PART XV  | 213,731.                                    | 156,744   |  |  |
|                   |   | 609,500.                                    |   |  | 609,500.   |
| £                 | 26 Total expenses and disbursements Add lines 24 and 25.  | 823,231.                                    | 156,744   | ١. ٥.  | 609,500.   |
|                   | 27 Subtract line 26 from line 12.   |   |   |  | W. 18 14 18 18 18 18 18 18 18 18 18 18 18 18 18  |
|                   | a Excess of revenue over expenses and disbursements.  | 100 512                                     |   |  |  |
|                   | b Net investment income (if negative, enter 0)  | 108,513.                                    | 738,013   | 6 19 AC LO 1 3 SECTION | 表現的   1995       |
|                   | C Adjusted net income (if negative, enter -0-)  |   | 730,013   | <u>,                                    </u>   | ANT TO BEEN TO TO TO   |
| BAA F             | or Paperwork Reduction Act Notice, see ins  | ivesivesarean and member 2008<br>tructions. | TEEA0504L 08/2  | 15/17  | Form 990-PF (2017)   |
|                   | y   |   | .22.00042 00/2  | 1  | 10   |
|                   |   |   |   |  | -  |

| D                 | र कि  | Balance Sheets   | Attached schedules an                    | d amounts in the description   | on L       | Beginning of year                      |  | End c           | of year   |
|-------------------|-------|--|--|--------------------------------|------------|--|--|-----------------|---|
| <u>"r</u> gar     |       | balance Sheets   | (See instructions)                       | nd-of year amounts only        |            | (a) Book Value                         | (b) Book Valu  | e e             | (c) Fair Market Value   |
|                   | 1     | Cash - non-interest  | -bearing                                 |                                |            | -                                      |  |                 |   |
|                   | 2     | Savings and tempora  | -  | nts                            |            | 301,935.                               | 169,0  | )15.            | 169,015.  |
|                   | 3     | Accounts receivable  | -  | •                              | . 1        |  | Alternative Visiting   |                 | 24-15/16/16/16/16/16/16/16/16/16/16/16/16/16/   |
|                   |       | Less allowance for o                                       |  | ·                              | se         |  | ESCULATIVE CAPPORT CONTRACTOR                                      | 44. 2 A 114. Ma |   |
|                   | 4     | Pledges receivable   |  | <b>-</b>                       |            |  |  |                 | \$278.00 SEC. 10.00   |
|                   | ~     | Less allowance for o                                       | doubtful accounts                        | ·                              | <u> </u>   |  | 27.07.043.043.043.07.52.053.043.043.043.043.043.043.043.043.043.04 |                 |   |
|                   | 5     | Grants receivable  | acabilal accounts                        |                                |            |  |  |                 |   |
|                   |       |  | aara dirantara triintaan                 | , and other                    | -          |  |  |                 |   |
|                   | 6     | Receivables due from offici<br>disqualified persons (attac | ch schedule) (see instr                  | uctions)                       |            |  |  |                 |   |
|                   | 7     | Other notes and loans rece                                 |  |                                | 54         | STATEMENT 6                            |  | 7000            | 313 7 PR (1 1 1 2 1 1 1 1 2 1 1 1 1 2 1 1 1 1 1   |
| Α                 | -     | Less allowance for o                                       |  |                                | ~   ···    | 1,135,454.                             | 1,073,7  | 75 <i>4</i>     | 1,073,754.  |
| ASSETS            | 8     | Inventories for sale of                                    |  |                                |            | 1,100,404.                             | 1,0,3,   |                 | 2/0/3/1011  |
| Ĕ                 | 9     | Prepaid expenses ar  |  | 20                             | -          |  |  |                 |   |
| Ţ                 |       | Investments 119  | and state govern                         | nont                           | -          | ······································ |  |                 |   |
| 3                 | 100   | Investments – US<br>obligations (attach se                 | chedule)                                 | "E"STATEMENT 7                 | 7          | 791,716.                               | 685,9  | 957.            | 685,957.  |
|                   | l b   | Investments — corporate s                                  |  | STATEMENT 8                    | 3          | 8,360,937.                             | 9,492,9  |                 | 9,492,913.  |
|                   | l '   | : Investments — corporate I                                | •  |                                | •  -       | 1,678,934.                             | 1,884,3  |                 | 1,884,381.  |
|                   | ĺ     | Investments - land,  |  | <b>^</b>                       | ×          |  |  | 135.3           | ######################################  |
|                   | ''    | equipment basis  | banangs, and                             | <b>•</b>                       |            |  |  |                 |   |
|                   |       | Less accumulated depreci                                   | iation                                   |                                |            |  |  |                 |   |
|                   |       | (attach schedule)  |  | <b>-</b>                       |            |  |  |                 |   |
|                   | 12    | Investments – morto  |  |                                | L          |  |  |                 |   |
|                   | 13    | Investments - other  | (attach schedule)                        | STATEMENT 1                    | ro [       | 6,112.                                 | 17,1   | L35.            | 17,135.   |
|                   | 14    | Land, buildings, and                                       |  | <b>•</b>                       | 2          |  |  |                 | 2. 2. Sec. 1. |
|                   |       | Less accumulated deprect (attach schedule)                 | ıatıon                                   | •                              |            |  |  |                 |   |
|                   |       | Other assets (describ                                      |  |                                | )[         |  |  |                 |   |
|                   | 16    | Total assets (to be of see the instructions                | completed by all for<br>Also, see page 1 | lers —<br>. item I)            |            | 12,275,088.                            | 13,323,1   | 55.             | 13,323,155.   |
| L                 | 17    | Accounts payable an  |  |                                |            | 22/2:0/000:                            | 2070207  |                 |   |
| Ĭ                 | 18    | Grants payable   |  |                                | <b>-</b>   | <del>-</del>                           | •••  |                 |   |
| A<br>B            | 19    | Deferred revenue   |  | •                              |            |  |  |                 |   |
| 1                 | 20    | Loans from officers, direct                                | tors, trustees, & other                  | disqualified persons           |            |  |  |                 |   |
| ī                 | 21    | Mortgages and other notes                                  |  |                                |            |  |  |                 |   |
| Ţ                 | 22    | Other liabilities (desc                                    |  | ,                              | \<br>-     | - =:                                   |  |                 |   |
| Ė                 |       |  |  |                                | ′⊢         |  |  | -               |   |
| E<br>S            | 23    | Total liabilities (add                                     |  |                                |            | 0.                                     |  | 0.              |   |
|                   |       | Foundations that fol and complete lines 2                  | llow SFAS 117, ch<br>24 through 26, an   | eck here<br>d lines 30 and 31. | ¹∐         |  |  |                 |   |
| N F               | 24    | Unrestricted   |  |                                |            |  | •  |                 |   |
| E U               | 25    | Temporarily restricte                                      | ed                                       |                                |            |  | <del></del> :  | , ,             |   |
| ' Ď               | 26    | Permanently restricte                                      |  |                                | -          | <del>-</del>                           |  |                 |   |
| A B A L A N       |       | Foundations that do and complete lines 2                   |  | 117, check here                | <b>►</b> X |  |  |                 |   |
| S A<br>E L<br>T A | 27    | Capital stock, trust p                                     |  |                                |            |  |  |                 |   |
| T A<br>S N        | 28    | Paid-in or capital surplus,                                | •  |                                | -          |  |  |                 |   |
| C                 | 29    | Retained earnings, accumu                                  |  |                                | ,  -       | 12,275,088.                            | 13,323,1   | 55              |   |
| O E<br>R S        | 30    | Total net assets or fe                                     | •  | •                              | }-         | 12,275,088.                            | 13,323,1   |                 |   |
| •                 | 31    | Total liabilities and r                                    | •  | •                              | -          | 12,275,088.                            | 13,323,1   |                 |   |
| Par               |       | Analysis of Chan   | ges in Net Ass                           | ets or Fund Bal                | lances     |  | 20,020,1   |                 | Figure Commercial applicable of a 4 of  |
|                   | Total | net assets or fund ba                                      | alances at beginni                       | ng of year - Part II,          |            | nn (a), line 30 (must a                | gree with  | 1               | 12 275 000  |
| 2                 |       | of-year figure reported                                    |  | atum)                          |            |  |  | 1               | 12,275,088.   |
| _                 |       | r amount from Part I,                                      |  | <b>-</b> CDD CM3 <i>m</i> CV7  | - mre      | •                                      |  | 2               | 108,513.  |
| 3                 |       | increases not included in lir                              | ne z (itemize)                           | SEE STATEME                    | <u> </u>   |  |  | 3               | 939,554.  |
| 4                 |       | lines 1, 2, and 3  | · + \                                    | _                              |            |  |  | 4               | 13,323,155.   |
| 5                 |       | ases not included in line 2 (                              | •  |                                |            | - 5                                    |  | 5               | 10 000 155  |
| 6                 | rotal | net assets or fund ba                                      | alances at end of                        | year (iine 4 minus li          | me 5) -    | - Part II, column (b),                 | irie 30  | 6               | 13,323,155.   |

| ·  | it i,v .   Capital Gallis aliu t   |  |   |                                     |             |   |  |
|--|--|--|---|-------------------------------------|-------------|---|--|
| (a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)  (b) How acquire P — Purcha D — Donate |  |  |   |                                     |             | (C) Date acquired (mo , day, yr )             | (d) Date sold<br>(mo , day yr)   |
| 1 8  | PUBLICLY TRADED SEC  | URITIES - ST   |   | P                                   |             | VARIOUS                                       | VARIOUS  |
| _  | PUBLICLY TRADED SEC  | ······································   |   | P                                   |             | VARIOUS                                       | VARIOUS  |
| (  | GAINS FROM VARIOUS   | NS FROM VARIOUS PARTNERSHIPS - LT P  |   |                                     |             |   |  |
|  | d CAPITAL GAIN DIVIDE  |  |   |                                     |             |   |  |
| (  | e  |  |   |                                     |             |   |  |
|  | (e) Gross sales price  (f) Depreciation allowed (g) Cost or other basis plus expense of sale   |  |   |                                     |             | (h) Gain or<br>((e) plus (f) m                | (loss)<br>inus (g))  |
|  | 2,503,136.   |  | 2,534   | 4,075.                              |             |   | -30,939.   |
| - 1  | 4,203,883.   |  | 3,64  | 5,732.                              |             |   | 558,151.   |
| •  | 84,502.  |  |   |                                     |             |   | 84,502.  |
|  | d  |  |   |                                     |             |   |  |
|  | e  |  |   |                                     |             |   |  |
|  | Complete only for assets show  | ing gain in column (h) and owned   | by the foundation on 12/31/   | 69                                  |             | (I) Gains (Col                                |  |
|  | (i) FMV as of 12/31/69   | (j) Adjusted basis<br>as of 12/31/69   | (k) Excess of col (ı) over col (j), ıf any  |                                     |             | ain minus col (k), b<br>an -0-) or Losses (fr |  |
|  | a  |  |   |                                     |             |   | -30,939.   |
|  | b  |  |   |                                     |             |   | 558,151.   |
| (  | C  |  |   |                                     |             |   | 84,502.  |
| (  | d  | _  |   |                                     |             |   | 1,044.   |
| (  | 9  |  |   |                                     |             |   |  |
| 2  | Capital gain net income or (ne   |  | enter in Part I, line 7<br>ter -0- in Part I, line 7  | -                                   | 2           |   | 612,758.   |
| 3  | Net short-term capital gain or (   | (loss) as defined in sections 1222(5   | i) and (6)  |                                     |             |   |  |
|  | If gain, also enter in Part I, line in Part I, line  | e 8, column (c) See instructions I   | (loss), enter -0-   |                                     | 3           |   | -30,939.   |
| Pai  | rt V Qualification Under   | Section 4940(e) for Reduce   | d Tax on Net Investm  | ent Inco                            | me          |   |  |
| (For   |  | oundations subject to the section 4940   |   |                                     |             |   |  |
|  |  | •  | • •   | •                                   |             |   |  |
| If se  |  |  |   |                                     |             |   |  |
|  | ction 4940(d)(2) applies, leave t  | his part blank   |   |                                     |             |   |  |
| Was  |  | his part blank<br>ction 4942 tax on the distributable a  | amount of any year in the b   | ase period                          | <u> 1</u> 7 | ∏Yes  | X No   |
|  | the foundation liable for the sec  | ·  | • •   | ase period                          | <b>ქ</b> ?  | Yes   | X No   |
|  | the foundation liable for the sec<br>es,' the foundation doesn't quali   | ction 4942 tax on the distributable a  | mplete this part  |                                     | <u>;</u>    | Yes   | X No   |
| If 'Y  | the foundation liable for the sec<br>es,' the foundation doesn't quali-<br>Enter the appropriate amount in   | ction 4942 tax on the distributable a<br>fy under section 4940(e) Do not co  | implete this part<br>structions before making any   |                                     | d?          | (d)   |  |
| If 'Y  | the foundation liable for the sec<br>es,' the foundation doesn't quali   | ction 4942 tax on the distributable a<br>fy under section 4940(e) Do not co<br>each column for each year, see the in   | mplete this part  | entries                             |             | Yes  (d)  Distribution (col (b) divided       | ratio  |
| If 'Y  | the foundation liable for the seces,' the foundation doesn't quali-<br>Enter the appropriate amount in (a)  Base period years Calendar year (or tax year beginning in)   | ction 4942 tax on the distributable a<br>fy under section 4940(e). Do not co<br>each column for each year, see the in<br>(b)<br>Adjusted qualifying distributions  | structions before making any  (c)  Net value of noncharitable-use ass   | entries<br>sets                     |             | (d) Distribution                              | ratio<br>by col (c))   |
| If 'Y  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in (a)  Base period years Calendar year (or tax year   | tion 4942 tax on the distributable as fy under section 4940(e). Do not contact the column for each year, see the interpretation (b).  Adjusted qualifying distributions.   | structions before making any  (c)  Net value of noncharitable-use ass   | entries<br>sets                     |             | (d) Distribution                              | ratio<br>by col (c))<br>0.058758   |
| If 'Y  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in (a)  Base period years Calendar year (or tax year beginning in)   | fy under section 4940(e) Do not contact the column for each year, see the interpretation (b)  Adjusted qualifying distributions  704,732. 656,030.   | mplete this part structions before making any (c) Net value of noncharitable-use ass 11,993   | entries<br>sets<br>3,794.           |             | (d) Distribution                              | ratio<br>by col (c))   |
| If 'Y  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in (a)  Base period years Calendar year (or tax year beginning in)  2016 2015  | trion 4942 tax on the distributable at fy under section 4940(e). Do not contain the column for each year, see the interpretation (b). Adjusted qualifying distributions.  704,732. 656,030. 830,789.   | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 345 12, 899  | entries sets 3,794. 5,175. 9,994.   |             | (d) Distribution                              | 0.058758<br>0.053141<br>0.064402   |
| If 'Y  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in (a)  Base period years Calendar year (or tax year beginning in)  2016 2015 2014   | tion 4942 tax on the distributable at fy under section 4940(e). Do not contain the column for each year, see the interpretation (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000.  | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 345 12, 899 12, 034  | entries 3,794. 5,175. 9,994. 4,337. |             | (d) Distribution                              | 0.058758<br>0.053141<br>0.064402<br>0.056754   |
| If 'Y  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in the second se | trion 4942 tax on the distributable at fy under section 4940(e). Do not contain the column for each year, see the interpretation (b). Adjusted qualifying distributions.  704,732. 656,030. 830,789.   | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 345 12, 899  | entries 3,794. 5,175. 9,994. 4,337. |             | (d) Distribution                              | 0.058758<br>0.053141<br>0.064402   |
| 1 1  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in the second se | tion 4942 tax on the distributable at fy under section 4940(e). Do not contain the column for each year, see the interpretation (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000.  | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 345 12, 899 12, 034  | entries 3,794. 5,175. 9,994. 4,337. |             | (d) Distribution                              | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520   |
| 1 1  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in (a)  Base period years Calendar year (or tax year beginning in)  2016 2015 2014 2013 2012  Total of line 1, column (d)  | tion 4942 tax on the distributable at fy under section 4940(e). Do not contact the column for each year, see the interest of the column for each year.   | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 899 12, 034  | entries 3,794. 5,175. 9,994. 4,337. |             | (d) Distribution                              | 0.058758<br>0.053141<br>0.064402<br>0.056754   |
| 2  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in the calculation of the calculation of the appropriate amount in the calculation of | tion 4942 tax on the distributable at fy under section 4940(e). Do not contain the column for each year, see the interpretation (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000.  | mplete this part structions before making any (c) Net value of noncharitable-use ass 11,993 12,343 12,899 12,034  | entries 3,794. 5,175. 9,994. 4,337. |             | (d) Distribution                              | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520   |
| 2  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in the calculation of the calculation of the appropriate amount in the calculation of | tion 4942 tax on the distributable as fy under section 4940(e). Do not contact the column for each year, see the interpretation (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000. 567,250.   | mplete this part structions before making any (c) Net value of noncharitable-use ass 11,993 12,343 12,899 12,034  | entries 3,794. 5,175. 9,994. 4,337. | 2           | (d) Distribution                              | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520   |
| 2  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in (a)  Base period years Calendar year (or tax year beginning in)  2016 2015 2014 2013 2012  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation   | tion 4942 tax on the distributable as fy under section 4940(e). Do not contact the column for each year, see the interpretation (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000. 567,250.   | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2           | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520   |
| 2 3  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in a gap and the secondary year (or tax year beginning in)  2016 2015 2014 2013 2012  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation.  | tion 4942 tax on the distributable at fy under section 4940(e). Do not contact the column for each year, see the interest of the column for each year. A see that year, see the interest of the column for each year, see the interest of the column for each year. A see that year, see the interest of the column for each year, see the interest of t | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2 3 4       | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520<br>0.283575<br>0.056715                                     |
| 2 3  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in (a)  Base period years Calendar year (or tax year beginning in)  2016 2015 2014 2013 2012  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation   | tion 4942 tax on the distributable at fy under section 4940(e). Do not contact the column for each year, see the interest of the column for each year. A see that year, see the interest of the column for each year, see the interest of the column for each year. A see that year, see the interest of the column for each year, see the interest of t | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2 3         | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520<br>0.283575<br>0.056715                                     |
| 2 3 4 5  | the foundation liable for the seces,' the foundation doesn't qualitative the appropriate amount in a Base period years Calendar year (or tax year beginning in)  2016 2015 2014 2013 2012  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation Enter the net value of nonchar Multiply line 4 by line 3   | ction 4942 tax on the distributable at fy under section 4940(e). Do not conteach column for each year, see the integration (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000. 567,250.  | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2 3 4 5     | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520<br>0.283575<br>0.056715<br>2,607,135.<br>715,014.           |
| 2 3  | the foundation liable for the seces,' the foundation doesn't qualification the appropriate amount in a gap and the secondary year (or tax year beginning in)  2016 2015 2014 2013 2012  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation.  | ction 4942 tax on the distributable at fy under section 4940(e). Do not conteach column for each year, see the integration (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000. 567,250.  | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2 3 4       | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520<br>0.283575<br>0.056715                                     |
| 2 3 4 5 6  | the foundation liable for the seces,' the foundation doesn't qualitative the appropriate amount in the calculation of t | ction 4942 tax on the distributable at fy under section 4940(e). Do not conteach column for each year, see the integration (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000. 567,250.  | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2 3 4 5 6   | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520<br>0.283575<br>0.056715<br>2,607,135.<br>715,014.<br>7,380. |
| 2 3 4 5  | the foundation liable for the seces,' the foundation doesn't qualitative the appropriate amount in the calculation of the calculati | ction 4942 tax on the distributable at fy under section 4940(e). Do not conteach column for each year, see the integration (b).  Adjusted qualifying distributions.  704,732. 656,030. 830,789. 683,000. 567,250.  | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2 3 4 5     | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520<br>0.283575<br>0.056715<br>2,607,135.<br>715,014.           |
| 2 3 4 5 6  | the foundation liable for the seces,' the foundation doesn't qualitative the appropriate amount in the calculation of t | ction 4942 tax on the distributable at fy under section 4940(e). Do not contact the column for each year, see the interpretation (b).  Adjusted qualifying distributions.  704, 732. 656, 030. 830, 789. 683, 000. 567, 250.  5-year base period — divide the total in has been in existence if less than attable-use assets for 2017 from Paragraphic (1% of Part I, line 27b).   | mplete this part structions before making any (c) Net value of noncharitable-use ass 11, 993 12, 343 12, 893 12, 034 11, 228 on line 2 by 5 0, or by the 15 years | entries 3,794. 5,175. 9,994. 4,337. | 2 3 4 5 6   | Distribution (col (b) divided                 | 0.058758<br>0.053141<br>0.064402<br>0.056754<br>0.050520<br>0.283575<br>0.056715<br>2,607,135.<br>715,014.<br>7,380. |

| Par | t VI   Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instruct  | ions)                     |
|-----|--|---------------------------|
| 1 a | 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,   | 14,760.                   |
|     | check here. ► and enter 1% of Part I, line 27b   | 1                         |
| c   | All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)  | :                         |
| 2   | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)   | 0.                        |
| 3   | Add lines 1 and 2  | 14,760.                   |
| 4   | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)   | 0.                        |
| 5   | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  | 14,760.                   |
| 6   | Credits/Payments   |                           |
| а   | 2017 estimated tax pmts and 2016 overpayment credited to 2017 6a 36, 987.  |                           |
|     | Exempt foreign organizations — tax withheld at source 6b   |                           |
|     | : Tax paid with application for extension of time to file (Form 8868)  | •                         |
|     | Backup withholding erroneously withheld  |                           |
| 7   | Total credits and payments Add lines 6a through 6d   | 36,987.                   |
| 8   | Enter any <b>penalty</b> for underpayment of estimated tax. Check here X if Form 2220 is attached.   | 30,307.                   |
| 9   | Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed   | 0.                        |
| 10  | Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid   | 22,227.                   |
| 11  | Enter the amount of line 10 to be Credited to 2018 estimated tax 22, 227. Refunded   | 0.                        |
|     | t VII-A   Statements Regarding Activities  | <u> </u>                  |
|     |  | Yes No                    |
| ıa  | 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?   | 1 a X                     |
| b   | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes?<br>See the instructions for the definition  | 1 ь Х                     |
|     | If the answer is 'Yes' to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  |                           |
| c   | : Did the foundation file Form 1120-POL for this year?   | 1c X                      |
| d   | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year  |                           |
|     |  | <u>D.</u>                 |
| е   | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers  • \$  • \$   |                           |
| 2   | Has the foundation engaged in any activities that have not previously been reported to the IRS?  | 2 X                       |
| -   | 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  | 3 X                       |
|     | Did the foundation have unrelated business gross income of \$1,000 or more during the year?  | 4a X                      |
|     | olf 'Yes,' has it filed a tax return on Form 990-T for this year?  | 4b N/A                    |
| 5   | Was there a liquidation, termination, dissolution, or substantial contraction during the year?   | 5 X                       |
| _   | 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  |                           |
|     | <ul> <li>By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict<br/>with the state law remain in the governing instrument?</li> </ul>   | 6 X                       |
| 7   | Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col (c), and Part XV   | 7 X                       |
|     | Enter the states to which the foundation reports or with which it is registered. See instructions  |                           |
|     | AZ   |                           |
| b   | off 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 <i>General Instruction G</i> ? If 'No,' attach explanation                                 | 8 b X                     |
| _   |  |                           |
| 9   | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(6) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If 'Yes,' complete Part XIV. | 9 X                       |
| 10  | Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses   | 10 X                      |
| BAA |  | Form <b>990-PF</b> (2017) |

| Part VII-A Statements Regarding Activities (continued)  |                  |             |               |
|---|------------------|-------------|---------------|
| At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule See instructions   | 11               | Yes         | No<br>X       |
| 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement See instructions   | 12               |             | х             |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application   | 7 13             | X           |               |
| Website address • N/A   |                  |             |               |
|   | 80) _865         | <u>-446</u> | 2             |
| Located at ► 4431 E. SUNSET DRIVE PHOENIX AZ ZIP + 4 ► 85028  |                  |             | · — ·         |
| 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here  | - <b>-</b> - N/Ā | •           |               |
| and enter the amount of tax-exempt interest received or accrued during the year   | L                | Yes         | N/A<br>No     |
| At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?   | 16               | 165         | X             |
| See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country.   |                  |             | }             |
| Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  | ,                |             |               |
| File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.   |                  | Yes         | No            |
| 1 a During the year, did the foundation (either directly or indirectly):  | .                |             | ŀ             |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes X   | No               |             | •<br>•        |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  | No               |             | •             |
|   | No               | İ           |               |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X  | 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  | No               |             | į             |
| b If any answer is 'Yes' to 1a(1)—(6), did any of the acts fail to qualify under the exceptions described in  |                  |             | <u>.</u> - ·  |
| 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  | 1 b              | N           | / A           |
|   |                  |             |               |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts,<br>that were not corrected before the first day of the tax year beginning in 2017?  | 1 c              |             | 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 2017, did the foundation have any undistributed income (lines 6d   | No               |             |               |
| and 6e, Part XIII) for tax year(s) beginning before 2017?  If 'Yes,' list the years ► 20 , 20 , 20  | No               | •           | *             |
|   |                  | ļ           |               |
| b Are there any years listed in 2a for which the foundation is <b>not</b> 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) | 2 b              | - N         | / <b>A</b>    |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here   |                  | (           | <del></del> - |
| ► 20 , 20 , 20 , 20   |                  | ,           | 1             |
| 3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes X   | No               | 1           | ;             |
| b If 'Yes,' did it have excess business holdings in 2017 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 payed? (I be Schodule C. Form 4730, to   |                  |             |               |
| (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 2017)  | 3 ь              | N           | /A            |
| 4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?   | 4 a              |             | Х             |
| <b>b</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   |                  |             | نـــ          |
| the tax year beginning in 2017?   | 4 b<br>Form 990  | )-PF (      | X<br>2017)    |

| Form 990-PF (2017) MARCO FOUNDATION  |  |  | 86-090   | 59412              |                    | age           |  |
|--|--|--|--|--------------------|--------------------|---------------|--|
| Part VII-B Statements Regarding Activit  |  | 1 4720 May Be Req                              | uired (continued)                                      | <del>-   -</del>   | 10                 | T             |  |
| <ol> <li>5 a During the year, did the foundation pay or incur a</li> <li>(1) Carry on propaganda, or otherwise attempt</li> </ol>                              | •  | in (section 4945(e))?                          | ☐ Yes 🛛  | No -               | Yes                | No            |  |
| ,  | •  |  |  |                    |                    |               |  |
| (2) Influence the outcome of any specific pub<br>on, directly or indirectly, any voter registra  | No<br>No   |  |  |                    |                    |               |  |
| (3) Provide a grant to an individual for travel,   | (3) Provide a grant to an individual for travel, study, or other similar purposes? |  |  |                    |                    |               |  |
| (4) Provide a grant to an organization other than in section 4945(d)(4)(A)? See instructions   |  |  | Yes X  | No                 |                    |               |  |
| (5) Provide for any purpose other than religio<br>educational purposes, or for the preventio   | n of cruelty to children   | or animals?                                    |  | No                 |                    |               |  |
| b If any answer is 'Yes' to 5a(1)—(5), did any of<br>described in Regulations section 53 4945 or in a d<br>See instructions                                    | the transactions fail to<br>current notice regarding o                             | qualify under the exce<br>disaster assistance? | ptions   |                    | b N                |               |  |
| Organizations relying on a current notice rega   | rding disaster assistant   | ce, check here                                 | ▶ 🗌  |                    |                    |               |  |
| c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon  | sibility for the grant?  |  | N/A Yes  | No                 |                    |               |  |
| If 'Yes,' attach the statement required by Regi  |  | • ,  |  |                    |                    |               |  |
| <ul><li>6 a Did the foundation, during the year, receive ar on a personal benefit contract?</li><li>b Did the foundation, during the year, pay premi</li></ul> |  |  | ∐ Yes [X]  | No 6               | <u> </u>           | X             |  |
| If 'Yes' to 6b, file Form 8870   | idins, directly of mairec  | ay, on a personal bene                         | iii contract   |                    | +                  | _^            |  |
| 7 a At any time during the tax year, was the found   | · ·  |  |  | No                 | _                  |               |  |
| b If 'Yes,' did the foundation receive any procee  |  |  |  | 1/A 7              |                    |               |  |
| Part VIII Information About Officers, Danie and Contractors  | irectors, Trustees,  | Foundation Manag                               | gers, Highly Paid E                                    | imployed           | es,                |               |  |
| List all officers, directors, trustees, and found  | dation managers and th   | neir compensation See                          | instructions   |                    |                    | -             |  |
| List an officers, directors, trustees, and found   | (b) Title, and average   | (c) Compensation                               | (d) Contributions to                                   | <u> </u>           |                    |               |  |
| (a) Name and address   | hours per week<br>devoted to position  | (If not paid,<br>enter -0-)                    | employee benefit<br>plans and deferred<br>compensation | (e) Exper<br>other | nse acc<br>allowar |               |  |
| MARK N. SKLAR  | DIRECTOR/PRE   | 0.   | 0.   |                    |                    | 0             |  |
| 4431 E. SUNSET DRIVE   | 1.00   |  |  |                    |                    |               |  |
| PHOENIX, AZ 85028  | ( (  |  | _  | ļ                  |                    |               |  |
| JO ANN SKLAR   | DIR/VP/SEC   | 0.   | 0.   |                    |                    | 0             |  |
| _4431 ESUNSET_DRPHOENIX, AZ 85028  | 1.00   |  |  |                    |                    |               |  |
| THOUNTY, RE 03020  |  | ·  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
| 2 Compensation of five highest-paid employees (of  | her than those included  | on line 1 – see instruction                    | l<br>ns). If none. enter 'NONE.                        | <u> </u>           |                    |               |  |
|  | (b) Title, and average   |  | (d)Contributions to                                    |                    |                    |               |  |
| (a) Name and address of each employee paid more than \$50,000  | hours per week<br>devoted to position  | (c) Compensation                               | employee benefit<br>plans and deferred<br>compensation | (e) Exper<br>other | allowar            | ount,<br>nces |  |
| NONE   |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  | .,   |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
|  |  |  |  |                    |                    |               |  |
| Total number of other employees paid over \$50,000   | <u> </u><br>   | <u> </u>                                       | •  |                    |                    |               |  |
|  |  |  |  | 4                  |                    | -             |  |

| Form 990-PF (2017) MARCO FOUNDATION   | 86-096                               |                           |
|---|--------------------------------------|---------------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundand Contractors (continued)                       | dation Managers, Highly Paid E       | mployees,                 |
| 3 Five highest-paid independent contractors for professional services. See in                                     | nstructions. If none, enter 'NONE.'  |                           |
| (a) Name and address of each person paid more than \$50,000   | (b) Type of service                  | (c) Compensation          |
| NONE  |                                      |                           |
|   |                                      | •                         |
|   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
| Total number of others receiving over \$50,000 for professional services  |                                      | 0                         |
|   |                                      | <u> </u>                  |
| Part IX-A Summary of Direct Charitable Activities   |                                      |                           |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical | al information such as the number of | Expenses                  |
| organizations and other beneficiaries served, conferences convened, research papers produced, etc                 |                                      |                           |
| 1 <u>N/A</u>  |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
| 2   |                                      |                           |
|   |                                      |                           |
| 3   |                                      |                           |
| ·   |                                      |                           |
|   |                                      |                           |
| 4   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
| Part IX-B   Summary of Program-Related Investments (see Instruc   | ctions)                              |                           |
| Describe the two largest program-related investments made by the foundation during the                            | e tax year on lines 1 and 2.         | Amount                    |
| 1 <u>N/A</u>  |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
| 2   |                                      |                           |
|   |                                      |                           |
| All other program-related investments See instructions  |                                      |                           |
| 3   |                                      |                           |
|   |                                      |                           |
|   |                                      |                           |
| Total. Add lines 1 through 3  | <b>&gt;</b>                          | 0.                        |
| BAA   |                                      | Form <b>990-PF</b> (2017) |

| Form 990-PF (2017) MARCO FOUNDATION  | 86-0969      |   |
|--|--------------|---|
| Part X Minimum Investment Return (All domestic foundations must complete this part. see instructions.)   | Foreign fo   | oundations,                             |
| 1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes<br>a Average monthly fair market value of securities                  | 1 a          | 12,552,023.                             |
| b Average of monthly cash balances   | 1 b          | 235, 475.                               |
| c Fair market value of all other assets (see instructions)   | 1 c          | 11,624.                                 |
| d Total (add lines 1a, b, and c)   | 1 d          | 12,799,122.                             |
| e Reduction claimed for blockage or other factors reported on lines 1a and   |              | 12,133,122.                             |
| 1c (attach detailed explanation)   | 0.           |   |
| 2 Acquisition indebtedness applicable to line 1 assets   | 2            | 0.                                      |
| 3 Subtract line 2 from line 1d   | 3            | 12,799,122.                             |
| 4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions).  | 4            | 191,987.                                |
| 5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  | 5            | 12,607,135.                             |
| 6 Minimum investment return. Enter 5% of line 5  | 6            | 630,357.                                |
| Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operand certain foreign organizations, check here ► ☐ and do not complete this part         | erating fou  |   |
| 1 Minimum investment return from Part X, line 6  | 1            | 630,357.                                |
| 2 a Tax on investment income for 2017 from Part VI, line 5   | 50.          |   |
| b Income tax for 2017 (This does not include the tax from Part VI)   |              |   |
| c Add lines 2a and 2b  | 2 c          | 14,760.                                 |
| 3 Distributable amount before adjustments Subtract line 2c from line 1   | 3            | 615,597.                                |
| 4 Recoveries of amounts treated as qualifying distributions  | 4            |   |
| 5 Add lines 3 and 4  | 5            | 615,597.                                |
| 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            | 615,597.                                |
| Part XII Qualifying Distributions (see instructions)   |              | - · · · · · · · · · · · · · · · · · · · |
| 1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes<br>a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26     | 1 a          | 609,500.                                |
| <b>b</b> Program-related investments — total from Part IX-B  | 1 b          |   |
| 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<br>a Suitability test (prior IRS approval required)  | 3 a          |   |
| <b>b</b> Cash distribution test (attach the required schedule)   | 3 b          |   |
| 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4  | 4            | 609,500.                                |
| 5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income<br>Enter 1% of Part I, line 27b See instructions                             | 5            |   |
| 6 Adjusted qualifying distributions. Subtract line 5 from line 4   | 6            | 609,500.                                |
| Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the qualifies for the section 4940(e) reduction of tax in those years. | : foundation |   |
| BAA  |              | Form 990-PF (2017)                      |

### Part XIII Undistributed Income (see instructions)

|   |                                       | (a)<br>Corpus  | (b)<br>Years prior to 2016 | <b>(c)</b><br>2016                              | <b>(d)</b><br>2017                              |
|---|---------------------------------------|--|----------------------------|---|---|
| 1 Distributable amount for 20   | 017 from Part XI,                     |  |                            |   | 615 507   |
| line 7  | f the and of 2017                     |  |                            |   | 615,597.  |
| 2 Undistributed income, if any, as of<br>a Enter amount for 2016 only |                                       |  |                            | 0.  |   |
| <b>b</b> Total for prior years 20 , 2                                 | _                                     |  | 0.                         | 0.  |   |
| 3 Excess distributions carryover, if a                                |                                       |  | U.                         | -   |   |
| a From 2012   | 16,575.                               |  |                            |   |   |
| <b>b</b> From 2013  | 100,936.                              |  |                            |   |   |
| c From 2014   | 211, 211.                             |  |                            |   |   |
| d From 2015   | 48,449.                               |  |                            |   |   |
| e From 2016   | 126,578.                              |  |                            |   |   |
| f Total of lines 3a through e   |                                       | 503,749.   |                            |   |   |
| 4 Qualifying distributions for  | <b>├</b>                              | 503,749.   |                            |   |   |
| XII, line 4 > \$  |                                       |  |                            |   |   |
| a Applied to 2016, but not m  | 609,500.                              |  |                            |   |   |
| a Applied to 2016, but not m  | lore than line 2a                     |  |                            | 0.  | <del></del> · · · · · · · · · · · · · · · · · · |
| b Applied to undistributed ind<br>(Election required — see in         | come of prior years<br>nstructions)   | CONTRACTOR OF ANY OF A STATE OF THE STATE OF | 0.                         | (ft. z. Crt.) i illipigo negli pino oozzootna i | 1   |
| c Treated as distributions ou<br>(Election required – see in          |                                       | 0.   |                            |   |   |
| d Applied to 2017 distributab   | · · · · · · · · · · · · · · · · · · · |  |                            |   | 609,500.  |
| e Remaining amount distribu   | J                                     | 0.   |                            |   | 000,000.  |
| 5 Excess distributions carryover app                                  | ·  -                                  | 6,097.   |                            |   | 6,097.  |
| (If an amount appears in c<br>same amount must be sho                 | column (d), the                       | 0,037.   |                            |   | 0,057.  |
| 6 Enter the net total of each   | column as                             |  |                            |   |   |
| indicated below:  | ]_                                    |  |                            |   |   |
| a Corpus Add lines 3f, 4c, and 4e S                                   | Subtract line 5                       | 497,652.   |                            |   |   |
| b Prior years' undistributed in<br>line 4b from line 2b               | ncome Subtract                        |  | 0.                         |   |   |
| c Enter the amount of prior y   | years' undistributed                  |  |                            |   |   |
| income for which a notice of been issued, or on which the             | of deficiency has he section 4942(a)  |  |                            |   |   |
| tax has been previously as  | sessed                                |  | 0.                         |   |   |
| <b>d</b> Subtract line 6c from line 6                                 | Sh Tavable                            |  |                            |   |   |
| amount - see instructions   |                                       |  | 0.                         |   |   |
| e Undistributed income for 2016 Si                                    | ubtract line 4a from                  |  |                            |   |   |
| line 2a Taxable amount — see ins                                      |                                       |  |                            | 0.  |   |
|   |                                       |  |                            |   | •   |
| f Undistributed income for 2i<br>4d and 5 from line 1. This           |                                       |  |                            |   |   |
| distributed in 2018   | amount mast be                        |  |                            |   | 0.  |
| 7 Amounts treated as distrib  | utions out of                         | -  |                            |   |   |
| corpus to satisfy requirement section 170(b)(1)(F) or 4942(           | ts imposed by                         |  | •                          |   |   |
| may be required — see ins   | structions)                           | 0.   |                            |   |   |
| 8 Excess distributions carryo   | war from 2012 not                     |  | -                          |   |   |
| applied on line 5 or line 7   | (see instructions)                    | 10,478.  |                            |   |   |
| 9 Excess distributions carry<br>Subtract lines 7 and 8 from           | vover to 2018.<br>In line 6a          | 487,174.   |                            |   |   |
| 10 Analysis of line 9   |                                       |  |                            |   |   |
| a Excess from 2013  | 100,936.                              |  |                            |   |   |
| <b>b</b> Excess from 2014   | 211,211.                              |  |                            |   |   |
| c Excess from 2015  | 48,449.                               |  |                            |   |   |
| d Excess from 2016  | 126,578.                              |  |                            |   |   |
| e Excess from 2017  |                                       |  |                            |   |   |
| BAA   |                                       | ·  | <del> </del>               | <u></u> l                                       | Form <b>990-PF</b> (2017)                       |

| Form 990-PF (2017) MARCO FOUNDATION  |  |                         |   | 86-0969412            |                                       |
|--|--|-------------------------|---|-----------------------|---------------------------------------|
| Part XIV   Private Operating Foundat   |  |                         |   | ·                     | N/A/                                  |
| 1 a if the foundation has received a ruling or dete<br>is effective for 2017, enter the date of the                                      | ermination letter that i                   | t is a private operatir | ng foundation, and the                          | ruling                |                                       |
| <b>b</b> Check box to indicate whether the foundat   |  | rating foundation de    | escribed in section                             | 4942(j)(3) oj/        | 4942(j)(5)                            |
| 2 a Enter the lesser of the adjusted net   | Tax year                                   |                         | Prior 3 years                                   |                       | (e) Total                             |
| income from Part I or the minimum investment return from Part X for  | (a) 2017                                   | <b>(b)</b> 2016         | (c) 2015  | ( <b>d)</b> 2014      |                                       |
| each year listed   |  |                         |   |                       | · · · · · · · · · · · · · · · · · · · |
| <b>b</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<br>for active conduct of exempt activities   |  |                         |   |                       |                                       |
| <ul> <li>Qualifying distributions made directly<br/>for active conduct of exempt activities<br/>Subtract line 2d from line 2c</li> </ul> |  |                         |   |                       |                                       |
| 3 Complete 3a, b, or c for the<br>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<br>minimum investment return shown in Part X,<br>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<br>more exempt organizations as provided<br>in section 4942(j)(8)(B)(iii)                       |  |                         |   |                       |                                       |
| (3) Largest amount of support from   |  |                         |   |                       |                                       |
| an exempt organization (4) Gross investment income   |  |                         |   |                       |                                       |
| Part XV   Supplementary Information  | (Complete this                             | nart only if the        | foundation had                                  | \$5,000 or more       | <u> </u>                              |
| assets at any time during th   | e year — see in:                           | structions.)            | Touridation nad                                 | ,5,555 51 111515      | •••                                   |
| 1 Information Regarding Foundation Manag   |  |                         |   |                       |                                       |
| a List any managers of the foundation who have<br>close of any tax year (but only if they have   | c contributed more the contributed more to | an 2% of the total co   | intributions received by<br>section 507(d)(2) ) | / the foundation befo | ore the                               |
| SEE STATEMENT 12   |  |                         | 000   |                       |                                       |
| h List any managers of the foundation who own  | 109/ or more of the                        | stack of a corporation  | o (or on oqually large)                         | portion of the owners | thin of                               |
| b List any managers of the foundation who own<br>a partnership or other entity) of which the<br>NONE                                     | foundation has a 10                        | )% or greater intere    | est   | Jordion of the owners | STAP OI                               |
| 2 Information Regarding Contribution, Grant, (   | Sift Loan Scholarsh                        | in etc Programs:        |   |                       |                                       |
| Check here  ☐ If the foundation only ma requests for funds. If the foundation make   | kes contributions to p                     | preselected charitable  |   |                       |                                       |
| 2a, b, c, and d See instructions  a The name, address, and telephone number or   | email address of the                       | person to whom an       | plications should be a                          | ddressed              | <del></del>                           |
|  |  | , p =                   |   |                       |                                       |
| SEE STATEMENT 13   |  |                         |   |                       |                                       |
| b The form in which applications should be s   | submitted and infor                        | mation and material     | ls they should include                          | e                     |                                       |
| SEE STATEMENT FOR LINE 2A  |  |                         |   |                       |                                       |
| c Any submission deadlines   |  |                         |   |                       |                                       |
| SEE STATEMENT FOR LINE 2A  |  |                         |   |                       |                                       |
| d Any restrictions or limitations on awards, s   | such as by geograph                        | nical areas, charitat   | ole fields, kinds of in                         | stitutions, or other  | factors                               |
| SEE STATEMENT FOR LINE 2A  |  |                         |   |                       |                                       |
| RΔΔ  | TES  | 00/14/17                |   | F(                    | orm 990-PF (2017)                     |

| 3 Grants and Contributions Paid During the | Year or Approved for Fut  | ure Paymen           | t                                |          |
|--|---|----------------------|----------------------------------|----------|
| Recipient                                  | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of | Purpose of grant or contribution | Amount   |
| Name and address (home or business)        | or substantial contributor  | recipient            |                                  | <u> </u> |
| a Paid during the year                     |   |                      |                                  |          |
| SEE STATEMENT 14                           |   |                      |                                  |          |
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|  |   |                      |                                  |          |
| Total                                      | *   |                      | ► 3a                             | 609,500. |
| <b>b</b> Approved for future payment       |   |                      |                                  | •        |
|  |   |                      |                                  |          |
|  |   | 1                    |                                  |          |
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| Total                                      |   |                      |                                  |          |
| Total                                      |   |                      | ► 3b                             |          |

| Enter gross amounts unless otherwise indicated                                     | Unrelated  | business income                             | Excluded by                  | section 512, 513, or 514                       | (e)  |  |
|--|--|---|------------------------------|--|--|--|
| Program service revenue  | (a)<br>Business<br>code                          | <b>(b)</b><br>Amount                        | (c)<br>Exclu<br>sion         | <b>(d)</b><br>Amount                           | Related or exempt function income (See instructions) |  |
| a  | · ·  | <del></del> -                               | code                         |  | ····   |  |
| b  | <del>                                     </del> | · · · · · · · · · · · · · · · · · · ·       |                              |  |  |  |
| C  |  |   |                              |  |  |  |
| d  | <del>                                     </del> |   | <del> </del>                 |  | <del></del>  |  |
| e  | <del></del>                                      |   | 1                            |  |  |  |
| f  |  |   |                              |  |  |  |
| g Fees and contracts from government agencies                                      |  |   |                              |  |  |  |
| 2 Membership dues and assessments  |  |   |                              |  |  |  |
| 3 Interest on savings and temporary cash investments                               |  |   |                              |  |  |  |
| 4 Dividends and interest from securities   |  |   | 14                           | 250,916.                                       |  |  |
| 5 Net rental income or (loss) from real estate                                     |  |   |                              |  |  |  |
| a Debt-financed property   |  |   |                              |  |  |  |
| <b>b</b> Not debt-financed property  |  |   |                              |  |  |  |
| 6 Net rental income or (loss) from personal property                               |  |   |                              |  |  |  |
| 7 Other investment income  |  |   |                              |  |  |  |
| 8 Gain or (loss) from sales of assets other than inventory                         |  |   | 18                           | 612,758.                                       |  |  |
| 9 Net income or (loss) from special events   |  |   |                              |  |  |  |
| 10 Gross profit or (loss) from sales of inventory                                  |  |   |                              |  |  |  |
| 11 Other revenue   |  |   |                              | •  |  |  |
| a FEDERAL TAX REFUND   |  |   | 1                            | 36,987.  |  |  |
| b INTEREST INCOME FROM K-1   |  |   | 14                           | 155.   |  |  |
| c INTEREST ON LOANS  |  |   | 14                           | 27,822.  |  |  |
| d ORDINARY INCOME FROM K-1   |  |   | 14                           | 2,827.   |  |  |
| e RENTAL INCOME FROM K-1   |  |   | 16                           | 279.   |  |  |
| 12 Subtotal Add columns (b), (d), and (e)  |  |   |                              | 931,744.                                       |  |  |
| 13 Total. Add line 12, columns (b), (d), and (e)                                   |  |   |                              | 13 _   | 931,744  |  |
| (See worksheet in line 13 instructions to verify calculat                          |  |   |                              |  |  |  |
| Part XVI-B   Relationship of Activities to th                                      | •  |   | •                            |  |  |  |
| Explain below how each activity for which accomplishment of the foundation's exemp | income is report<br>of purposes (other           | ed in column (e) of<br>er than by providing | Part XVI-A confunds for such | ontributed importantly<br>th purposes) (See in | y to the<br>istructions )                            |  |
| N/A  |  | <del>-</del>                                |                              | <u> </u>                                       |  |  |
| N/ A   |  |   |                              |  |  |  |
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# Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

|  |   | Exempt Orga  | nižationš                              |  |                                      |                       | •  |  |                                       |                      |       |
|--|---|--|--|--|--------------------------------------|-----------------------|--|--|---------------------------------------|----------------------|-------|
| d  | escribe   | organization directed in section 501(<br>to political organ                          | c) of the Code (                       | engage in any of<br>other than section | the following win 501(c)(3) organ    | th arry r<br>nization | other organizations) or in section               | וע<br>527,   |                                       | Yes                  | No    |
|  | _   |  |  | o a noncharitable                      | exempt organiz                       | ation o               | f  |  |                                       |                      |       |
|  | <ul> <li>a Transfers from the reporting foundation to a noncharitable exempt organization of</li> <li>(1) Cash</li> </ul> |  |  |  |                                      |                       |  |  | 1 a (1)                               |                      | х     |
| •  | (2) Other assets  |  |  |  |                                      |                       |  |  | 1 a (2)                               |                      | X     |
|  | •   | ansactions   |  |  |                                      |                       |  |  |                                       |                      |       |
|  | (1) Sales of assets to a noncharitable exempt organization  |  |  |  |                                      |                       |  |  | 1 b (1)                               |                      | Х     |
| (2) Purchases of assets from a noncharitable exempt organization |   |  |  |  |                                      |                       |  |  | 1 b (2)                               | · · · · · · ·        | X     |
| (3) Rental of facilities, equipment, or other assets             |   |  |  |  |                                      |                       |  |  | 1 b (3)                               |                      | X     |
| •  | (4) Reimbursement arrangements  |  |  |  |                                      |                       |  |  | 1 b (4)                               | -                    | X     |
| •  | •   | ns or loan guaran  | -                                      |  |                                      |                       |  |  | 1 b (5)                               |                      | X     |
| •  | •   | formance of servi  |  | hip or fundraising                     | solicitations                        |                       |  |  | 1 b (6)                               |                      | X     |
| c S  | haring  | of facilities, equi  | pment, mailing l                       | ists, other assets                     | , or paid employ                     | ees                   |  |  | 1 c                                   |                      | Х     |
| th   | ne good   | nswer to any of th<br>ds, other assets, or<br>nsaction or sharin                     | services given by                      | , the reporting four                   | ndation. If the four                 | ndation               | received less tha                                | n fair market val                                  | ue in                                 | ue of                |       |
| (a) Line   | e no  | (b) Amount involved  | d (c) Name                             | of noncharitable exer                  | mpt organization                     | (0                    | d) Description of tra                            | nsfers, transactions                               | , and sharing arrai                   | ngemen               | ts    |
| N/A  | _   |  |  |  |                                      |                       |  |  |                                       |                      |       |
|  |   |  |  |  |                                      |                       |  |  |                                       |                      |       |
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|  |   | ••••   |  |  |                                      |                       | ······································           | <del></del>  |                                       |                      |       |
|  |   |  |  |  |                                      |                       |  |  | ····                                  |                      |       |
|  |   |  |  |  |                                      |                       | ······································           |  | <del> </del>                          |                      |       |
|  | -   |  |  |  |                                      |                       |  |  |                                       |                      |       |
|  |   |  |  |  |                                      |                       |  |  |                                       |                      |       |
|  |   | <del></del>  |  |  |                                      |                       |  |  |                                       |                      |       |
|  |   | ***************************************  |  |  |                                      |                       |  |  |                                       |                      |       |
|  | -   | <del></del>  | <del> </del>                           |  |                                      |                       |  |  | · · · · · · · · · · · · · · · · · · · |                      |       |
|  |   |  |  |  |                                      |                       |  |  |                                       |                      |       |
| d  | escribe<br>'Yes,'   | undation directly or<br>ed in section 501(<br>complete the foll<br>) Name of organiz | c) of the Code (owing schedule         | other than section                     | to, one or more tan 501(c)(3)) or in | section               | n 527?   | c) Description o                                   | Yes                                   | X                    | No    |
| N/A  | ,α  | ,  |  | (6) (9)                                | o or organization                    |                       | <del>                                     </del> | , 5000 phon 0                                      |                                       |                      |       |
| / **   |   |  | -                                      |  |                                      |                       | †  |  |                                       |                      | ——    |
|  |   |  |  |  |                                      |                       |  |  |                                       |                      |       |
|  |   |  |  |  |                                      |                       | <del>                                     </del> |  |                                       |                      |       |
|  |   |  |  |  |                                      |                       |  |  |                                       |                      |       |
|  | Under p   | penalties of perjury, I de<br>and complete Declara                                   | eclare that I have example of property | mined this return, inclu               | ding accompanying sc                 | hedules a             | nd statements, and to                            | the best of my know                                | wledge and belief, i                  | t is true            |       |
| Sign   |   | and complete Declara   | Milon of preparer (office              | i illali taxpayaris basi               | ed on an information o               | n willen p            | reparer has any knov                             | vieuge   | May the                               | RS disc              | uss   |
| Here   |   |  | $\sim$                                 |  | 11/8/15                              |                       | DIDECTOR /F                                      | NDEC.  | this retur                            | n with th            | ne    |
|  | Sinna   | ature of officer or trustee  | · · · · · · · · · · · · · · · · · · ·  |  | Date                                 |                       | DIRECTOR/F                                       | KES  | See instr                             | uctions <sub>r</sub> | - I   |
|  | 1   | Print/Type preparer's  |  | Preparer's                             |                                      |                       | Date _   | 10: 1  | DTIN                                  | Yes                  | No    |
| D  |   | 1  |  | رين                                    | 101 Y-A                              | -0                    | ع دام اراً "                                     | Check  | J"                                    |                      |       |
| Paid   |   |  | WHITAKER                               | Van                                    | w und                                | <u> </u>              | 11/01.0  | <del>,                                      </del> | P00146                                | 222                  |       |
| Prepa  |   | Firm's name  | BLAINE A.                              |  | CPA, PLLC                            |                       |  | Firm's EIN 20                                      | <u> 0741103</u>                       |                      |       |
| Use C  | nly   | Firm's address   |  |  | STE 103                              |                       |  | 1  |                                       |                      |       |
|  |   | <u> </u>   | PHOENIX,                               | AZ 85016                               |                                      |                       |  | Phone no (   | 502) 264-                             |                      |       |
| BAA  |   |  |  |  |                                      |                       |  |  | Form <b>99</b>                        | 0-PF (               | 2017) |

| 2017  | FEDERAL STATEMENTS  | PAGE 1                         |  |  |
|---|---|--------------------------------|--|--|
|   | MARCO FOUNDATION  | 86-0969412                     |  |  |
| STATEMENT 1<br>FORM 990-PF, PART I, LINE 11<br>OTHER INCOME   |   |                                |  |  |
| FEDERAL TAX REFUND<br>INTEREST INCOME FROM K-1<br>INTEREST ON LOANS<br>ORDINARY INCOME FROM K-1<br>RENTAL INCOME FROM K-1 | (A) (B) NET REVENUE INVESTMENT PER BOOKS INCOME  \$ 36,987.   | (C) ADJUSTED NET INCOME        |  |  |
| STATEMENT 2<br>FORM 990-PF, PART I, LINE 16A<br>LEGAL FEES  | - TOTAL <u>- 00,070.</u>  | <u> </u>                       |  |  |
| LEGAL FEES  | (A) (B) NET (C) EXPENSES INVESTMENT ADJUSTED PER BOOKS INCOME NET INCOME  \$ 610. \$ 610.  TOTAL \$ 610. \$ 610. \$ 610.              |                                |  |  |
| STATEMENT 3<br>FORM 990-PF, PART I, LINE 16B<br>ACCOUNTING FEES   | ,   |                                |  |  |
| ACCOUNTING FEES   | (A) (B) NET (C) EXPENSES INVESTMENT ADJUSTED PER BOOKS INCOME NET INCOME  \$ 4,390. \$ 4,390. \$  TOTAL \$ 4,390. \$ 4,390. \$  \$ 0. | (D) CHARITABLE PURPOSES  \$ 0. |  |  |
| STATEMENT 4<br>FORM 990-PF, PART I, LINE 16C<br>OTHER PROFESSIONAL FEES   |   |                                |  |  |
| INVESTMENT FEES   | (A) (B) NET (C) EXPENSES INVESTMENT ADJUSTED PER BOOKS INCOME NET INCOME  TOTAL \$ 142,433. \$ 142,433. \$ 0.                         | (D) CHARITABLE PURPOSES  \$ 0. |  |  |

| 017   | FEDERAL S  | STATEMENTS  |                            | PAGE 2                          |
|---|------------|---|----------------------------|---------------------------------|
|   | MARCO F    | OUNDATION   |                            | 86-0969412                      |
| STATEMENT 5<br>FORM 990-PF, PART I, LINE<br>TAXES                     | 18         |   |                            |                                 |
|   |            | NSES INVESTMEN<br>BOOKS INCOME                          | (C) T ADJUSTED NET INCOM   | (D)<br>CHARITABLE<br>E PURPOSES |
| FEDERAL TAXES<br>FOREIGN TAXES  | 9          | 5, 987.<br>9, 311. \$ 9, 31<br>5, 298. \$ 9, 31         | 1.<br>1. \$ (              | <u>\$</u> 0.                    |
| OTHER NOTES AND LOANS LOANS TO MARK TARBELL LOAN TO WHISPERING HOP    | RECEIVABLE | BOOK VALUE \$ 424,754 455,000 194,000 OTAL \$ 1,073,754 | . \$ 424,754<br>. 455,000  | ALLOWANCE                       |
|   |            | LLOWANCE FOR DOUI<br>NOTES/LOANS REC                    |                            |                                 |
| STATEMENT 7<br>FORM 990-PF, PART II, LINE<br>INVESTMENTS - U.S. AND S |            | BLIGATIONS  |                            |                                 |
| U.S. GOVERNMENT OBLIGA  | TIONS      | VALUATION<br>METHOD                                     | BOOK<br>VALUE              | FAIR MARKET<br>VALUE            |
| GOVERNMENT SECURITIES   |            | MKT VAL   | \$ 614,236.<br>\$ 614,236. | \$ 614,236.<br>\$ 614,236.      |
| STATE/MUNICIPAL OBLIGA  | TIONS      | VALUATION<br>METHOD                                     | BOOK<br>VALUE              | FAIR MARKETVALUE                |
| MUNICIPAL BONDS   |            | MKT VAL<br>TOTAL  | 71,721.                    | 71,721.<br>\$ 71,721.           |
|   |            | TOTAL   | \$ 685,957.                | \$ 685,957.                     |

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| 2017 FEDERAL   | FEDERAL STATEMENTS           |                                      |                                      |  |  |
|--|------------------------------|--------------------------------------|--------------------------------------|--|--|
| MARCO  | FOUNDATION                   |                                      | 86-0969412                           |  |  |
| STATEMENT 8<br>FORM 990-PF, PART II, LINE 10B<br>INVESTMENTS - CORPORATE STOCKS            |                              |                                      |                                      |  |  |
| CORPORATE STOCKS STOCKS  | VALUATION METHOD MKT VAL     | BOOK<br>VALUE<br>\$ 9,492,913.       | FAIR MARKET VALUE  \$ 9,492,913.     |  |  |
|  | TOTAL                        | \$ 9,492,913.                        | \$ 9,492,913.                        |  |  |
| STATEMENT 9<br>FORM 990-PF, PART II, LINE 10C<br>INVESTMENTS - CORPORATE BONDS             |                              |                                      |                                      |  |  |
| CORPORATE BONDS  | VALUATION<br>METHOD          | BOOK<br>VALUE                        | FAIR MARKET VALUE                    |  |  |
| CORPORATE BONDS  | MKT VAL<br>TOTAL             | \$ 1,884,381.<br>\$ 1,884,381.       | \$ 1,884,381.<br>\$ 1,884,381.       |  |  |
| STATEMENT 10<br>FORM 990-PF, PART II, LINE 13<br>INVESTMENTS - OTHER                       |                              |                                      | **                                   |  |  |
| OTHER SECURITIES   | VALUATION METHOD             | BOOK<br>VALUE                        | FAIR MARKET<br>VALUE                 |  |  |
| SMS FINANCIAL XXIII LLC SMS FINANCIAL XIX LLC SMS FINANCIAL XXIV LLC SMS FINANCIAL XXV LLC | COST<br>COST<br>COST<br>COST | \$ 1,810.<br>0.<br>13,526.<br>1,799. | \$ 1,810.<br>0.<br>13,526.<br>1,799. |  |  |
|  | TOTAL                        | \$ 17,135.                           | \$ 17,135.                           |  |  |
| STATEMENT 11<br>FORM 990-PF, PART III, LINE 3<br>OTHER INCREASES                           |                              |                                      | -                                    |  |  |
| NET UNREALIZED GAINS OR LOSSES ON INVEST   | rments .                     | TOTAL                                | \$ 939,554.<br>\$ 939,554.           |  |  |

STATEMENT 12 FORM 990-PF, PART XV, LINE 1A FOUNDATION MANAGERS - 2% OR MORE CONTRIBUTORS

MARK N. SKLAR JO ANN SKLAR

### **FEDERAL STATEMENTS**

PAGE 4

#### **MARCO FOUNDATION**

86-0969412

#### **STATEMENT 13** FORM 990-PF, PART XV, LINE 2A-D **APPLICATION SUBMISSION INFORMATION**

NAME OF GRANT PROGRAM:

NAME:

MARK N. SKLAR

CARE OF:

STREET ADDRESS:

4431 E. SUNSET DR. PHOENIX, AZ 85028 480-367-7367

CITY, STATE, ZIP CODE: TELEPHONE:

E-MAIL ADDRESS:

FORM AND CONTENT:

IN WRITING BY QUALIF ORG UNDER SEC 501(C)(3) IRC. STATE

REQUEST & PURPOSE.

SUBMISSION DEADLINES:

NONE

RESTRICTIONS ON AWARDS:

ORGANIZATIONS QUALIFIED UNDER SEC 501(C)(3) OF THE

INTERNAL REVENUE CODE.

### **STATEMENT 14** FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

| NAME AND ADDRESS  | DONEE<br>RELATIONSHIP | FOUND-<br>ATION<br>STATUS | PURPOSE OF<br>GRANT               | <i>1</i> | AMOUNT   |
|---|-----------------------|---------------------------|-----------------------------------|----------|----------|
| ALEH ISRAEL FOUNDATION<br>PO BOX 4911<br>NEW YORK NY 10185                                      | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | \$       | 5,000.   |
| BOYS & GIRLS CLUBS OF METRO<br>PHOENIX<br>4309 E. BELLEVIEW ST., BLDG<br>14<br>PHOENIX AZ 85008 | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 10,000.  |
| UNITED STATES HOLOCAUST<br>MEMORIAL MUSEUM<br>100 RAOUL WALLENBERG PL SW<br>WASHINGTON DC 20024 | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 5,000.   |
| BANNER ALZHEIMER'S<br>FOUNDATION<br>901 E. WILLETTA, 3RD FLOOR<br>PHOENIX AZ 85006              | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 100,000. |
| ASU FOUNDATION<br>PO BOX 2260<br>TEMPE AZ 85280   | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 20,000.  |
| AMERICAN RED CROSS<br>431 18TH STREET NW<br>WASHINGTON DC 20006                                 | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 10,000.  |

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## FEDERAL STATEMENTS

## PAGE 5

#### MARCO FOUNDATION

86-0969412

### STATEMENT 14 (CONTINUED) FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

| NAME AND ADDRESS  | DONEE<br>RELATIONSHIP | FOUND-<br>ATION<br>STATUS | PURPOSE OF<br>GRANT               | AMOUNT        |
|---|-----------------------|---------------------------|-----------------------------------|---------------|
| HEART OF JESUS RETREAT CENTER 2927 S. GREENVILLE STREET SANTA ANA CA 92704              | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | \$<br>10,000. |
| FBI NATIONA ACADEMY AZ<br>CHAPTER<br>620 W. WASHINGTON ST.<br>PHOENIX AZ 85003          | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 5,000.        |
| MAINE ADAPTIVE SPORTS & RECREATION 8 SUNDANCE LANE NEWRY ME 04261                       | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 10,000.       |
| JEWISH COMMUNITY FOUNDATION<br>12701 N. SCOTTSDALE RD.,<br>#202<br>SCOTTSDALE AZ 85254  | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 65,000.       |
| MANNED SPACE FLIGHT<br>EDUCATION FOUNDATION<br>1601 NASA PARKWAY<br>HOUSTON TX 77058    | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 10,000.       |
| PHOENIX ART MUSEUM<br>1625 N. CENTRAL AVE.<br>PHOENIX AZ 85004                          | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 10,000.       |
| SW WILDLIFE CONSERVATION<br>CENTER<br>8711 E. PINNACLE PEAK ROAD<br>SCOTTSDALE AZ 85255 | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 5,000.        |
| VALLEY BEIT MIDRASH<br>4645 E. MARILYN RD.<br>PHOENIX AZ 85032                          | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 40,000.       |
| WHISPERING HOPE RANCH<br>PO BOX 54070<br>PHOENIX AZ 85078                               | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 50,000.       |
| CHILDSPLAY<br>900 S. MITCHELL DR.<br>TEMPE AZ 85281                                     | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 45,000.       |
| PARDES JEWISH DAY SCHOOL<br>12753 N. SCOTTSDALE RD.<br>SCOTTSDALE AZ 85254              | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | 27,000.       |

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## FEDERAL STATEMENTS

PAGE 6

#### **MARCO FOUNDATION**

86-0969412

### STATEMENT 14 (CONTINUED) FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

| NAME AND ADDRESS   | DONEE<br>RELATIONSHIP | FOUND-<br>ATION<br>STATUS | PURPOSE<br>GRANT                  | OF       | AMOUNT   |
|--|-----------------------|---------------------------|-----------------------------------|----------|----------|
| THE SCHOOL OF ARCHITECTURE<br>AT TALIESIN<br>12621 N. FRANK LLOYD WRIGHT<br>BLVD.<br>SCOTTSDALE AZ 85259 | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT | \$       | 20,000.  |
| BBYO<br>800 EIGHTH STREET NW<br>WASHINGTON DC 20001  | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 15,000.  |
| THE PHOENIX SYMPHONY<br>ONE NORTH FIRST STREET,<br>SUITE 200<br>PHOENIX AZ 85004                         | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 50,000.  |
| JEWISH FEDERATION OF<br>GREATER PHOENIX<br>12701 NORTH SCOTTSDALE<br>ROAD, # 201<br>SCOTTSDALE AZ 85254  | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 87,500.  |
| TEMPLE KOL AMI<br>15030 N. 64TH STREET<br>SCOTTSDALE AZ 85254  | NONE                  | PC                        | GENERAL<br>OPERATIONAL<br>SUPPORT |          | 10,000.  |
|  |                       |                           |                                   | TOTAL \$ | 609,500. |