

Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**

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

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information

OMB No 1545-0052

**2018**

Open to Public Inspection

For calendar year 2018 or tax year beginning

, and ending

Name of foundation <b>MARCH FAMILY FOUNDATION</b>		A Employer identification number <b>20-4705723</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>6425 NORTHPORT DRIVE</b>		B Telephone number <b>214-434-1757</b>
City or town, state or province, country, and ZIP or foreign postal code <b>DALLAS, TX 75230</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <b>16,551,326.</b>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		4,541,134.		N/A	
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		283,819.	283,819.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		2,689,932.			
b Gross sales price for all assets on line 6a <b>3,915,356.</b>					
7 Capital gain net income (from Part IV, line 2)			2,689,932.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total Add lines 1 through 11		7,514,885.	2,973,751.		
13 Compensation of officers, directors, trustees, etc		0.			0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees					
17 Interest					
18 Taxes <b>STMT 2</b>		31,258.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses Add lines 13 through 23		31,258.	0.		0.
25 Contributions, gifts, grants paid		345,665.			345,665.
26 Total expenses and disbursements Add lines 24 and 25		376,923.	0.		345,665.
27 Subtract line 26 from line 12		7,137,962.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			2,973,751.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing					
	2 Savings and temporary cash investments			1,037,202.	387,739.	387,739.
	3 Accounts receivable ▶					
	Less allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations STMT 3			0.	1,752,936.	1,761,623.
	b Investments - corporate stock STMT 4			2,910,152.	8,321,291.	13,284,490.
	c Investments - corporate bonds					
	Liabilities	11 Investments - land, buildings and equipment basis ▶				
Less accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other STMT 5				500,000.	1,123,350.	1,117,474.
14 Land, buildings, and equipment, basis ▶						
Less accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)				4,447,354.	11,585,316.	16,551,326.
17 Accounts payable and accrued expenses						
18 Grants payable						
Net Assets or Fund Balances	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶)					
23 Total liabilities (add lines 17 through 22)			0.	0.		
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	27 Capital stock, trust principal, or current funds			0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds			4,447,354.	11,585,316.	
	30 Total net assets or fund balances			4,447,354.	11,585,316.	
31 Total liabilities and net assets/fund balances			4,447,354.	11,585,316.		

## Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,447,354.
2 Enter amount from Part I, line 27a	2	7,137,962.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	11,585,316.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	11,585,316.

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

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a NATIONAL FINANCIAL SERVICES, LLC - SEE			
b ATTACHED			
c NATIONAL FINANCIAL SERVICES, LLC - CAPITAL			
d GAIN DISTRIBUTIONS	D		
e 21.24 SHARES - TEXAS INSTRUMENTS, INC.			08/14/18

  

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b 3,806,877.		1,223,080.	2,583,797.
c			
d 106,135.			106,135.
e 2,344.		2,344.	0.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			2,583,797.
c			
d			106,135.
e			0.

  

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	2,689,932.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div> <div>If gain, also enter in Part I, line 8, column (c).</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	3	N/A

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

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

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

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

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	245,950.	5,665,984.	.043408
2016	115,750.	2,693,937.	.042967
2015	59,100.	929,103.	.063610
2014	35,200.	646,482.	.054449
2013	31,400.	540,660.	.058077

  

2 Total of line 1, column (d)	2	.262511
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.052502
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	12,090,093.
5 Multiply line 4 by line 3	5	634,754.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	29,738.
7 Add lines 5 and 6	7	664,492.
8 Enter qualifying distributions from Part XII, line 4	8	345,665.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	59,475.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	59,475.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	59,475.
6 Credits/Payments			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	17,200.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments Add lines 6a through 6d	7	17,200.	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	0.	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	42,275.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2019 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered See instructions. <input type="checkbox"/> TX		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

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

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X	
14 The books are in care of ▶ KEVIN & CAROL MARCH Telephone no. ▶ 214-642-5701 Located at ▶ 6425 NORTHPORT DRIVE, DALLAS, TX ZIP+4 ▶ 75230		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A		
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here N/A		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?		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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018.) N/A		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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

	Yes	No
5a During the year, did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A	
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A	
If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
If "Yes" to 6b, file Form 8870.		
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
KEVIN MARCH	DIRECTOR			
6425 NORTHPORT DRIVE				
DALLAS, TX 75230	2.00	0.	0.	0.
CAROL MARCH	DIRECTOR			
6425 NORTHPORT DRIVE				
DALLAS, TX 75230	2.00	0.	0.	0.
SEAN MARCH	DIRECTOR			
6425 NORTHPORT DRIVE				
DALLAS, TX 75230	0.50	0.	0.	0.
SHANNON MARCH	DIRECTOR			
6425 NORTHPORT DRIVE				
DALLAS, TX 75230	0.25	0.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	11,910,982.
b	Average of monthly cash balances	1b	363,224.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	12,274,206.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	12,274,206.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	184,113.
5	<b>Net value of noncharitable-use assets</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,090,093.
6	<b>Minimum investment return</b> Enter 5% of line 5	6	604,505.

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

1	Minimum investment return from Part X, line 6	1	604,505.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	59,475.
b	Income tax for 2018 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	59,475.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	545,030.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	545,030.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	545,030.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	345,665.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	345,665.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	<b>Adjusted qualifying distributions</b> Subtract line 5 from line 4	6	345,665.

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

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**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				545,030.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018				
a From 2013	0.			
b From 2014	24.			
c From 2015	13,660.			
d From 2016				
e From 2017	0.			
f Total of lines 3a through e	13,684.			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$	345,665.			
a Applied to 2017, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				345,665.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	13,684.			13,684.
6 Enter the net total of each column as indicated below				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				185,681.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

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

N/A

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling

**b** Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or 4942(j)(5)

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

b 85% of line 2a

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

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

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

Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon.

(1) Value of all assets

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

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

c "Support" alternative test - enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

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

**(3) Largest amount of support from an exempt organization**

(4) Gross investment income

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

### 1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

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

c Any submission deadlines

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

**Part XV** Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
DALLAS CHILDREN'S THEATER 5938 SKILLMAN DALLAS, TX 75231	NONE	PC	PROVIDE ACCESS TO THE PERFORMING ARTS FOR FAMILIES AND CHILDREN IN THE DALLAS AREA.	10,000.
OAK LAWN PARK CONSERVANCY P.O. BOX 190872 DALLAS, TX 75219	NONE	PC	TO SUPPORT THE PRESERVATION AND MAINTENANCE OF OAK LAWN PARK.	2,500.
METROPOLITAN MINISTRIES 2002 NORTH FLORIDA AVENUE TAMPA, FL 33602	NONE	PC	IN SUPPORT OF THEIR PROGRAMS FOR THE HOMELESS.	1,000.
WATERTOWER THEATRE 15650 ADDISON ROAD ADDISON, TX 75001	NONE	PC	SUPPORT OF CREATING AN INNOVATIVE AND DIVERSE THEATRE THAT BUILDS COMMUNITY BY FOSTERING EMPATHY.	3,000.
DALLAS CHILDREN'S THEATER - BLUE NILE 5938 SKILLMAN DALLAS, TX 75231	NONE	PC	PROVIDE ACCESS TO THE PERFORMING ARTS FOR FAMILIES AND CHILDREN IN THE DALLAS AREA.	5,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>3a</b> 345,665.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>3b</b> 0.

Form 990-PF (2018)





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

Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Founder, status of recipient	Purpose of grant or contribution	Amount
GEORGE W BUSH PRESIDENTIAL CENTER 2943 SMU BOULEVARD DALLAS, TX 75205	NONE	PC	SUPPORT THE DEVELOPMENT OF LEADERS, ADVANCE POLICY AND ACTIONS TO SOLVE TODAY'S PRESSING CHALLENGES.	33,334.
SECOND THOUGHT THEATRE 3839 MCKINNEY AVE., SUITE 155-452 DALLAS, TX 75204	NONE	PC	SUPPORT THE THEATRE'S EFFORTS SUPPORTING LOCAL ACTORS AND PRODUCTION TEAMS IN EARNING A LIVING WAGE.	1,000.
DALLAS CHILDREN'S ADVOCACY CENTER 5351 SAMUELL BOULEVARD DALLAS, TX 75228	NONE	PC	SUPPORT THE IMPROVEMENT OF THE LIVES OF ABUSED CHILDREN AND TO PROVIDE LEADERSHIP ON CHILD ABUSE ISSUES.	1,000.
TRINITY RIVER MISSION - MISSION OLE 2060 SINGLETON BOULEVARD, #104 DALLAS, TX 75212	NONE	PC	PROMOTE LITERACY, AUGMENT ACADEMIC SKILLS AND DEVELOP EDUCATIONAL SUCCESS OF CHILDREN AND FAMILIES.	1,000.
DALLAS CHILDREN'S THEATER - CABARET 5938 SKILLMAN DALLAS, TX 75231	NONE	PC	PROVIDE ACCESS TO THE PERFORMING ARTS FOR FAMILIES AND CHILDREN IN THE DALLAS AREA.	5,000.
CAFE MOMENTUM 1510 PACIFIC DALLAS, TX 75201	NONE	PC	SUPPORT BREAKING THE CYCLE OF RECIDIVISM THROUGH A POST-RELEASE INTERNSHIP FOR YOUNG MEN AND WOMEN.	5,000.
DALLAS THEATER CENTER 2400 FLORA ST DALLAS, TX 75201	NONE	PC	SUPPORT OF A THEATRE THAT IS CREATING EXPERIENCES THAT STIMULATE NEW WAYS OF THINKING AND LIVING.	1,000.
<b>Total from continuation sheets</b>				324,165.

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

Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SHUMLA P.O. BOX 627 COMSTOCK, TX 78837	NONE	PC	IN SUPPORT OF THE ALEXANDRIA PROJECT, TO PRESERVE AND DOCUMENT THE ROCK ART OF THE LOWER PECOS AREA.	50,000.
TACA - THE ARTS COMMUNITY ALLIANCE ONE ARTS PLAZA, 1722 ROUTH STREET. SUITE 115 DALLAS, TX 75201	NONE	PC	SUPPORT EXCELLENCE AND IMPACT IN THE ARTS THROUGH GRANT-MAKING, CAPACITY BUILDING, AND THOUGHT LEADERSHIP.	10,000.
DALLAS CHILDREN'S THEATER 5938 SKILLMAN DALLAS, TX 75231	NONE	PC	IN SUPPORT OF PIONEERING EFFORTS TO DEVELOP INNOVATIVE ARTS-IN-EDUCATION PROGRAMS.	5,000.
HIGH TECH HIGH HEELS P.O. BOX 671222 DALLAS, TX 75367	NONE	PC	IN SUPPORT OF THEIR DEDICATION TO CLOSING THE GENDER GAP IN STEM PROFESSIONS.	5,000.
UNITED WAY FOUNDATION 1800 N LAMAR ST. DALLAS, TX 75230	NONE	PC	IN SUPPORT OF ADDRESSING COMMUNITY ISSUES IN A HOLISTIC WAY BY FOCUSING ON THE BUILDING BLOCKS OF OPPORTUNITY - EDUCATION, INCOME AND HEALTH - THAT EVERY PERSON AND COMMUNITY NEEDS TO THRIVE.	87,081.
TRINITY RIVER MISSION 2060 SINGLETON BOULEVARD, #104 DALLAS, TX 75212	NONE	PC	IN SUPPORT OF PROMOTING LITERACY, AUGMENTING ACADEMIC SKILLS AND DEVELOPING EDUCATIONAL SUCCESS AMONG CHILDREN AND FAMILIES.	2,500.
KITCHEN DOG THEATER 2600 N. STEMMONS FREEWAY, SUITE 180 DALLAS, TX 75207	NONE	PC	IN SUPPORT OF THE THEATRE THAT PROVOKES AND CHALLENGES.	2,000.
<b>Total from continuation sheets</b>				

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

Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DALLAS SYMPHONY ORCHESTRA 2301 FLORA DALLAS, TX 75201	NONE	PC	SUPPORT CLASSICAL MUSIC ORCHESTRA.	5,000.
KERA RADIO, NORTH TEXAS 3000 HARRY HINES BOULEVARD DALLAS, TX 75201	NONE	PC	SUPPORT PUBLIC RADIO.	10,000.
UNDERMAIN THEATRE 3200 MAIN STREET DALLAS, TX 75226	NONE	PC	IN SUPPORT OF THEIR MISSION TO PRODUCE NEW AND EXPERIMENTAL THEATRE.	1,000.
JUVENILE DIABETES RESEARCH FOUNDATION 8140 WALNUT HILL LANE, SUITE 810 DALLAS, TX 75231	NONE	PC	IN SUPPORT OF FUNDING RESEARCH, ADVOCATING FOR POLICIES THAT ACCELERATE ACCESS TO NEW THERAPIES AND PROVIDING A SUPPORT NETWORK FOR MILLIONS OF PEOPLE AROUND THE WORLD IMPACTED BY T1D.	1,000.
CROW COLLECTION OF ASIAN ART 2010 FLORA STREET DALLAS, TX 75201	NONE	PC	IN SUPPORT OF THE MUSEUM'S INNOVATIVE PROGRAMS AND EXHIBITIONS.	1,000.
SECOND THOUGHT THEATRE 3839 MCKINNEY AVE., SUITE 155-452 DALLAS, TX 75204	NONE	PC	IN SUPPORT OF THE THEATRE'S EFFORTS TO SUPPORT LOCAL ACTORS AND PRODUCTION TEAM MEMBERS IN EARNING A LIVING WAGE.	1,000.
AT&T PERFORMING ARTS CENTER 2403 FLORA STREET, SUITE #500 DALLAS, TX 75201	NONE	PC	TO SUPPORT THE DALLAS ARTS DISTRICT.	1,000.
<b>Total from continuation sheets</b>				



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

Grants and Contributions Received and During the year		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Recipient	Name and address (home or business)				
UNITED WAY FOUNDATION 1800 NORTH LAMAR STREET DALLAS, TX 75202	NONE	PC	IN SUPPORT OF ADDRESSING COMMUNITY ISSUES IN A HOLISTIC WAY BY FOCUSING ON THE BUILDING BLOCKS OF OPPORTUNITY - EDUCATION, INCOME AND HEALTH - THAT EVERY PERSON AND COMMUNITY NEEDS TO THRIVE.	90,000.	
AUSTIN PETS ALIVE 1156 WEST CESAR CHAVEZ STREET AUSTIN, TX 78703	NONE	PC	FOR SUPPORT PROVIDING CARE AND ASSISTANCE TO AUSTIN'S INNOVATIVE NO-KILL PET SHELTER.	1,000.	
TO WRITE LOVE ON HER ARMS P.O. BOX 2203 MELBOURNE, FL 32902	NONE	PC	PROVIDE HELP ON THOSE DEALING WITH DEPRESSION, ADDICTION, SELF-INJURY AND SUICIDE.	1,875.	
VH1 SAVE THE MUSIC FOUNDATION 1515 BROADWAY, 20TH FLOOR NEW YORK, NY 10036	NONE	PC	TO SUPPORT MUSIC EDUCATION IN AMERICA'S PUBLIC SCHOOLS.	1,875.	
AMFAR (THE FOUNDATION FOR AIDS RESEARCH) 120 WALL STREET, FLOOR 13 NEW YORK, NY 10005	NONE	PC	IN SUPPORT OF HIV CURE RESEARCH.	500.	
Total from continuation sheets					17

**Schedule B**

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

- Attach to Form 990, Form 990-EZ, or Form 990-PF.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2018**

Name of the organization

Employer identification number

**MARCH FAMILY FOUNDATION****20-4705723**

Organization type (check one)

Filers of.

Section:

Form 990 or 990-EZ

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

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

**Special Rules**

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

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

Name of organization	Employer identification number
MARCH FAMILY FOUNDATION	20-4705723

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 131,986.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 142,584.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
3	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 100,221.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
4	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 52,598.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
5	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 99,424.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
6	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 106,985.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization	Employer identification number
MARCH FAMILY FOUNDATION	20-4705723

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 68,516.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
8	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 98,731.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
9	KEVIN AND CAROL MARCH 425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 97,074.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
10	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 50,231.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
11	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 2,368,176.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
12	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 2,368,110.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization	Employer identification number
MARCH FAMILY FOUNDATION	20-4705723

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13	KEVIN AND CAROL MARCH 6425 NORTHPORT DRIVE DALLAS, TX 75230	\$ 2,854,571.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization	Employer identification number
MARCH FAMILY FOUNDATION	20-4705723

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	975 SHARES OF ADP	\$ 131,986.	07/30/18
2	400 SHARES OF BANK OF AMERICA	\$ 142,584.	07/30/18
3	760 SHARES OF JOHNSON & JOHNSON	\$ 100,221.	07/30/18
4	1,205 SHARES OF LEGGETT & PLATT	\$ 52,598.	07/30/18
5	308 SHARES OF LOCKHEED MARTIN CORPORATION	\$ 99,424.	07/30/18
6	1,564 SHARES OF SYSCO CORPORATION	\$ 106,985.	07/30/18

Name of organization	Employer identification number
MARCH FAMILY FOUNDATION	20-4705723

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
7	767 SHARES OF WASTE MANAGEMENT, INC.	\$ 68,516.	07/30/18
8	2,126 SHARES OF AFLAC CORPORATION	\$ 98,731.	08/02/18
9	842 SHARES OF JP MORGAN	\$ 97,074.	08/02/18
10	771 SHARES OF MERCK & CO., INC.	\$ 50,231.	08/02/18
11	21,057 SHARES OF TEXAS INSTRUMENTS, INC.	\$ 2,368,176.	08/03/18
12	20,435 SHARES OF TEXAS INSTRUMENTS, INC.	\$ 2,368,110.	08/08/18

Employer identification number

20-4705723

## Part II

[illegible]



Name of organization

Employer identification number

MARCH FAMILY FOUNDATION

20-4705723

**Part III**

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

Use duplicate copies of Part III if additional space is needed

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

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
NATIONAL FINANCIAL SERVICES - AMORTIZED PREMIUM	<12,702.>	0.	<12,702.>	<12,702.>	
NATIONAL FINANCIAL SERVICES, LLC - ACCRUED INTEREST	<30,301.>	0.	<30,301.>	<30,301.>	
NATIONAL FINANCIAL SERVICES, LLC - DIVIDEND INCOME	280,456.	0.	280,456.	280,456.	
NATIONAL FINANCIAL SERVICES, LLC - INTEREST INCOME	46,366.	0.	46,366.	46,366.	
TO PART I, LINE 4	283,819.	0.	283,819.	283,819.	

FORM 990-PF	TAXES			STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX ON NET INVESTMENT INCOME	31,258.	0.		0.
TO FORM 990-PF, PG 1, LN 18	31,258.	0.		0.

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FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	3
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
UNITED STATES TREASURY/AGENCY SECURITIES - NET OF PREMIUM AMORTIZATION	X		1,752,936.	1,761,623.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,752,936.	1,761,623.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,752,936.	1,761,623.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	4
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE SECURITIES	3,121,291.	8,608,945.
MUTUAL FUNDS	5,200,000.	4,675,545.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,321,291.	13,284,490.

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FORM 990-PF	OTHER INVESTMENTS	STATEMENT	5
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CERTIFICATES OF DEPOSIT	COST	1,123,350.	1,117,474.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,123,350.	1,117,474.

FORM 990-PF

LIST OF SUBSTANTIAL CONTRIBUTORS  
PART VII-A, LINE 10

STATEMENT 6

NAME OF CONTRIBUTORADDRESS

KEVIN MARCH

6425 NORTHPORT DRIVE  
DALLAS, TX 75230

CAROL MARCH

6425 NORTHPORT DRIVE  
DALLAS, TX 75230