

For calendar year 2022, or tax year beginning 01-01-2022 , and ending 12-31-2022

Name of foundation THE MARCUS FOUNDATION INC		A Employer identification number 58-1815651
Number and street (or P.O. box number if mail is not delivered to street address) 1266 W PACES FERRY RD 615	Room/suite	B Telephone number (see instructions) (404) 240-7700
City or town, state or province, country, and ZIP or foreign postal code ATLANTA, GA 30327		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ <u>100,467,714</u>	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	105,336,700			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	1,887,995	2,032,830		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-4,427,263			
	b Gross sales price for all assets on line 6a <u>39,973,567</u>				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	89,250	89,250		
	12 Total. Add lines 1 through 11	102,886,682	2,122,080		
	13 Compensation of officers, directors, trustees, etc.	1,783,506	178,351		1,605,155
	14 Other employee salaries and wages	1,128,749	112,875		1,015,874
	15 Pension plans, employee benefits	714,557	71,456		643,101
	16a Legal fees (attach schedule)	116,500	0		116,500
	b Accounting fees (attach schedule)	70,280	35,140		35,140
	c Other professional fees (attach schedule)	616,613	168,713		447,900
	17 Interest	8,962,631	0		8,962,631
	18 Taxes (attach schedule) (see instructions)	251,202	13,706		129,725
	19 Depreciation (attach schedule) and depletion	34,511	0		
	20 Occupancy	205,058	20,501		184,557
	21 Travel, conferences, and meetings	384,584	0		384,584
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,343,229	45,124		1,298,105
	24 Total operating and administrative expenses. Add lines 13 through 23	15,611,420	645,866		14,823,272
	25 Contributions, gifts, grants paid	169,731,413			169,731,413
	26 Total expenses and disbursements. Add lines 24 and 25	185,342,833	645,866		184,554,685
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-82,456,151			
	b Net investment income (if negative, enter -0-)		1,476,214		
	c Adjusted net income (if negative, enter -0-)				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		7,274,134	2,336,744	2,336,744
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____		977,905		
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ _____ 10,522,066 Less: allowance for doubtful accounts ▶ _____ 0		9,718,675	10,522,066	10,522,066
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		149,889	379,686	379,686
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)		59,596,251	49,904,645	49,904,645
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)		31,186,610	34,502,163	34,502,163
	14	Land, buildings, and equipment: basis ▶ _____ 1,995,461 Less: accumulated depreciation (attach schedule) ▶ _____ 1,670,892		82,548	324,569	324,569
15	Other assets (describe ▶ _____)		2,131,263	2,497,841	2,497,841	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		111,117,275	100,467,714	100,467,714	
Liabilities	17	Accounts payable and accrued expenses		34,752	146,270	
	18	Grants payable				
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)		353,655,480	423,773,480	
	22	Other liabilities (describe ▶ _____)		1,100,635	7,533,523	
	23	Total liabilities (add lines 17 through 22).		354,790,867	431,453,273	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ☒ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions		-243,673,592	-330,985,559	
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ☐ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds				
	29	Total net assets or fund balances (see instructions)		-243,673,592	-330,985,559	
	30	Total liabilities and net assets/fund balances (see instructions) .		111,117,275	100,467,714	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	-243,673,592
2	Enter amount from Part I, line 27a	2	-82,456,151
3	Other increases not included in line 2 (itemize) ▶ _____	3	3,543,985
4	Add lines 1, 2, and 3	4	-322,585,758
5	Decreases not included in line 2 (itemize) ▶ _____	5	8,399,801
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	-330,985,559

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PUBLICLY TRADED SECURITIES	P		
b PASS-THRU FROM K-1 INVESTMENTS	P		
c PASS-THRU UBI FROM K-1 INVESTMENTS	P		
d CAPITAL GAINS DIVIDENDS	P		
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 39,255,634		44,400,830	-5,145,196
b 578,880			578,880
c 59,846			59,846
d 79,207			79,207
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-5,145,196
b			578,880
c			59,846
d			79,207
e			

Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	-4,427,263
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.			
	Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		1	20,519
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) 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	20,519
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	20,519
6	Credits/Payments:			
a	2022 estimated tax payments and 2021 overpayment credited to 2022	6a	21,000	
b	Exempt foreign organizations—tax withheld at source	6b	0	
c	Tax paid with application for extension of time to file (Form 8868)	6c	5,000	
d	Backup withholding erroneously withheld	6d	0	
7	Total credits and payments. Add lines 6a through 6d		7	26,000
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2221 is attached.		8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	5,481
11	Enter the amount of line 10 to be: Credited to 2023 estimated tax Refunded		11	0

Part VI-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0 (2) On foundation managers. \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
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		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
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 XIV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) GA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
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 2022 or the taxable year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No

Part VI-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
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	Yes	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of DOUGLAS P DINAPOLI Telephone no. (404) 240-7700 Located at 1266 W PACES FERRY RD 615 ATLANTA GA ZIP+4 30327			
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			
16	At any time during calendar year 2022, 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	16	Yes	No

Part VI-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?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
	(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)?	1a(5)		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.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
c	Organizations relying on a current notice regarding disaster assistance check here.			
d	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 2022?	1d		No
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 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?. If "Yes," list the years 20 , 20 , 20 , 20	2a		No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a		No
b	If "Yes," did it have excess business holdings in 2022 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 2022.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022?	4b		No

Part VI-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to:

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

5a(1)

No

(2)

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

5a(2)

No

(3)

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

5a(3)

No

(4)

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

5a(4)

Yes

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

5a(5)

No

b

If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

5b

No

c

Organizations relying on a current notice regarding disaster assistance check

5c

d

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?

5d

Yes

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

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

6a

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

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?

7a

No

b

If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

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 during the year?

8

No

Part VII

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

1

List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BERNARD MARCUS	CHAIRMAN	2,927	20,394	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	10.00			
KEN LANGONE	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	2.00			
DOUG HERTZ	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	2.00			
DOUGLAS P DINAPOLI	FINANCE DIRECTOR	118,148	16,391	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	10.00			
FREDERICK MARCUS	DIRECTOR	51,822	40,353	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	10.00			
FREDERICK SLAGLE	SEC/TREASURER	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	5.00			
JAMES GRIEN	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	2.00			
JAY KAIMAN	PRESIDENT	515,613	65,272	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	40.00			
LARRY SMITH	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30339	2.00			
MICHAEL LEVEN	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	2.00			
MICHAEL MORRIS	DIRECTOR	50,000	8,042	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	10.00			
FRANK BLAKE	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	2.00			
RENAY BLUMENTHAL	VICE PRESIDENT	390,239	42,879	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	40.00			
TINA PRICE	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	2.00			
TONY GELBART	DIRECTOR	0	0	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	2.00			

2

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SIMMONS J	MEDICAL DIRECTOR	772,901	63,272	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	40.00			
RUZEK M	PROG OFFICER	227,069	67,357	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	40.00			
KAISER-BLUETH J	PROG OFFICER	203,547	63,680	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	40.00			
LEVY E	GRANTS MANAGER	139,409	36,464	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	40.00			
BRAID R	GRANTS ADMINISTRATOR	81,481	44,052	0
1266 W PACES FERRY RD 615 ATLANTA, GA 30327	40.00			

Total

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

0

Part VII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
PERSHING SUMMIT TRAIL	INVESTMENT MANAGEMENT	168,562
2 GRAND CENTRAL PLAZA NEW YORK,NY 10017		
FORTIER PUBLIC RELATIONS	PUBLIC RELATION	131,206
401 OCEAN DRIVE STE 918 MIAMI,FL 33139		
COPELAND DESIGN	CONSULTING	130,000
PO BOX 133128 ATLANTA,GA 30333		
ALSTON & BIRD LLP	LEGAL	114,068
PO BOX 933124 ATLANTA,GA 31193		
ARYE CARMON	CONSULTING	95,000
1266 W PACES FERRY RD 615 ATLANTA,GA 30327		

Part VIII- Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

Part VIII- Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Part IX 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	86,515,617
b	Average of monthly cash balances.	1b	1,363,553
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	87,879,170
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	87,879,170
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	1,318,188
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	86,560,982
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	4,328,049

Part X 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 IX, line 6.	1	4,328,049
2a	Tax on investment income for 2022 from Part V, line 5.	2a	20,519
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	20,519
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	4,307,530
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	4,307,530
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	4,307,530

Part XI 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	184,554,685
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	276,532
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	184,831,217

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				4,307,530
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2017.	129,888,824			
b From 2018.				
c From 2019.	12,153,780			
d From 2020.	8,074,267			
e From 2021.	37,873,974			
f Total of lines 3a through e.	187,990,845			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ _____	184,831,217			
a Applied to 2021, 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).	 105,336,700			
d Applied to 2022 distributable amount				4,307,530
e Remaining amount distributed out of corpus	75,186,987			
5 Excess distributions carryover applied to 2022. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	368,514,532			
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 2021. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	105,336,700			
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions)	129,888,824			
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a	133,289,008			
10 Analysis of line 9:				
a Excess from 2018				
b Excess from 2019	12,153,780			
c Excess from 2020.	8,074,267			
d Excess from 2021	37,873,974			
e Excess from 2022	75,186,987			

Part XIII

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling

b

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

2a

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

b

85% (0.85) of line 2a

c

Qualifying distributions from Part XI, 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:

a

"Assets" alternative test—enter:

(1)

Value of all assets

(2)

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

b

"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, 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

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).)

BERNARD MARCUS

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.

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. See instructions

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:

Grants and Contributions Paid During the Year or Approved for Future Payment		Supplementary Information (continued)		Part III		
Amount and description (home or business)		If recipient is an individual, show any relationship to any foundation manager or substantial contributor		Foundation status of recipient	Purpose of grant or contribution	Amount
a. Paid during the year						
1800DOORS	390 NORTH MAIN STREET SUITE 203 NATICK, MA 01760	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	660,000	
3565 PIEDMONT ROAD NE BUILDING ONE ATLANTA, GA 303658202		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,000,000	
6 POINTS SPORTS ACADEMY	6100S NEW YORK, NY 10017	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	60,000	
70 FACES MEDIA AVENUE 4TH FLOOR NEW YORK, NY 10018		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	50,000	
ACADEMIC ENGAGEMENT NETWORK	1190 77TH STREET NW SUITE 700 WASHINGTON, DC 20036	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	321,000	
ADICAH ROAD REISTERSTOWN, MD 211364110		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	250,000	
AFSNC	5425 MT CULHARD ROAD REISTERSTOWN, MD 211364110	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,000,000	
40 WEST 57TH STREET 26TH FLOOR NEW YORK, NY 100194001		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
130 LEE AVE UNIT 407 BROOKLYN, NY 112118031		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	60,000	
ALFRED A ADELADE DAVIS ACADEMY THE ATLANTA, GA 303304120		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	75,000	
ALGEMEINER THE 208 E 51ST ST NEW YORK, NY 10022		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	75,000	
AMERICA-ISRAEL CULTURAL FOUNDATION	175 COLUMBUS AVENUE PO BOX 237113 NEW YORK, NY 10023	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	50,000	
AMERICAN FRIENDS OF LIBI	45 BARTLESS CRESCENT ROAD BROOKLINE, MA 024662220	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	2,814,698	
AMERICAN FRIENDS OF MAGEN DAVID	352 7TH AVENUE SUITE 400 NEW YORK, NY 10018	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	50,000	
AMERICAN FRIENDS OF THE HEBREW UNIVERSITY	199 WATER STREET NEW YORK, NY 10038	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	250,000	
AMERICAN FRIENDS OF THE ISRAELI SPORT CENTER FOR THE DISABLED	1 NORTHFIELD PLAZA SUITE 100 WORTHFIELD, IL 600931234	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,000,000	
AMERICAN ISRAEL EDUCATION FOUNDATION	251 H STREET NW WASHINGTON, DC 200012604	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	25,000	
AMERICAN JEWISH COMMUNITY	165 E 56TH ST NEW YORK, NY 100222709	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	125,000	
ARIEVIN PHILANTHROPIC GROUP	229 7TH AVENUE 9TH FLOOR NEW YORK, NY 100196896	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	177,167	
ARIZONA STATE UNIVERSITY FOUNDATION FOR A NEW AMERICAN UNIVERSITY	PO BOX 2260 ATTN PAYROLL BENEFITS TEMPE, AZ 852810000	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	60,000	
ATLANTA JEWISH ACADEMY	5200 NORTHLAND DRIVE ATLANTA, GA 303422058	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	50,000	
2244 NORTHWEST PKWY SE MARIETTA, GA 30067		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	60,000	
ATLANTA JEWISH LIFE FOUNDATION	270 CARPENTER DR NE STE 320 ATLANTA, GA 30328	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	200,000	
ATLANTA POLICE FOUNDATION	191 PEACHTREE STREET NE SUITE 191 ATLANTA, GA 30303	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	375,000	
ATLANTA SCHOLARS KOLLEL	1959 LAVISTA ROAD NE ATLANTA, GA 303293842	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	5,000	
ATLANTA SPEECH SCHOOL	3160 NORTHSIDE PARKWAY NW ATLANTA, GA 30327	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	825,000	
BBYO	800 8TH STREET NW WASHINGTON, DC 200013724	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	150,000	
BE PRO BOO PROUD GEORGIA	335 COWLEWOOD WAY SANDY SPRINGS, GA 303282956	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	650,000	
BIG BROTHERS BIG SISTERS OF METRO ATLANTA	1382 PEACHTREE STREET NE ATLANTA, GA 303293248	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	130,000	
BILL OF RIGHTS INSTITUTE	1301 NORTH COUNTRYHOUSE ROAD SUITE ARLINGTON, VA 222012594	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	4,030,000	
BIRTHRIGHT ISRAEL FOUNDATION	711 THIRD AVENUE 10TH FLOOR NEW YORK, NY 100174158	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	75,000	
BLUE DOVE FOUNDATION	1200 RASHWOOD PKWY STE 400 ATLANTA, GA 3034749	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	7,567,687	
BOULDER CRUISE	33235 SWICKERSVILLE TURNPIKE BLUMONT, VA 20135	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	300,000	
BOUNDLESS ISRAEL	258 WARREN ST WALTHAM, MA 024537021	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	2,500	
BOYS TOWN JERUSALEM FOUNDATION OF AMERICA	110 HILLSIDE BLVD SUITE 14 LAKEWOOD, NJ 08701	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	10,000	
BUSINESS EXECUTIVES FOR NATIONAL SECURITY	1030 15TH STREET NW SUITE 200 EAST WASHINGTON, DC 200051503	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	60,000	
CAMP COLEMAN	1580 SPALDING DRIVE ATLANTA, GA 30350	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	60,000	
CAMP JUDAEA	1440 SPRING ST NW ATLANTA, GA 303292832	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,200,000	
CAMP TWIN LAKES	1100 SPRING STREET NW SUITE 260 ATLANTA, GA 303292854	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	25,000	
CANDID	32 OLD SYP 24TH FLOOR NEW YORK, NY 100050000	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	421,355	
CASE WESTERN RESERVE UNIVERSITY	10900 EUCLID AVENUE CLEVELAND, OH 441061712	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	75,000	
CENTER FOR ISRAELI EDUCATION	825 HOUSTON MILL ROAD ATLANTA, GA 303294246	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	750,000	
CHABAD INTOWN	730 PONCE DE LEON PLACE NE ATLANTA, GA 303064287	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	230,000	
CHABAD OF NORTH FULTON	10180 JONES BRIDGE ROAD ALPHARETTA, GA 300225037	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	666,666	
CHILDREN'S HEALTHCARE OF ATLANTA FOUNDATION	10901 N 120TH AVENUE SUITE 450 BROOKFIELD, IL 60013134	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	4,483,607	
CITIZENS FOR NATIONAL SECURITY	1575 RIVERSIDE EXPRESSWAY BROOKHAVEN, GA 30329	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	50,000	
4530 HAZLETON LANE LAKE WORTH, FL 33449		NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,108,536	
CITY OF HOPE	1500 DUARTE RD DUARTE, CA 910103012	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
COLLEGE AIM	825 VIRGINIA PARK CIRCLE NE ATLANTA, GA 30306	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	75,000	
COMMUNITY FOUNDATION FOR GREATER ATLANTA	191 PEACHTREE STREET NE SUITE 1900 ATLANTA, GA 303031741	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	20,000	
CONGREGATION SHEARIT ISRAEL	1180 UNIVERSITY DR NE ATLANTA, GA 30306	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	733,056	
CONSTRUCTION REFORM	1945 N REBECCAH ST SUITE 200 ATLANTA, GA 3032028	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	20,000	
CREATING CONNECTED COMMUNITIES	PO BOX 300247 ATLANTA, GA 31150	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
DOROTHY AND MYER S KRIKLE INSTITUTE FOR JEWISH FAMILY LITERACY	2200 W MAIN STREET SUITE 820 DURHAM, NC 27278	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	10,374,887	
EMORY UNIVERSITY	201 DOWMAN DRIVE ATLANTA, GA 30322	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	250,000	
ENTER THE JEWISH PEOPLEHOOD ALLIANCE	249 ROYAL PALM WAY UITE 303 PALM BEACH, FL 334801133	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	7,500	
EPSTEIN SCHOOL FOUNDATION	335 COWLEWOOD WAY SANDY SPRINGS, GA 303282956	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	65,000	
EPSTEIN SCHOOL THE	335 COWLEWOOD WAY ATLANTA, GA 303282956	NONE	EXPENDITURE RESPONSIBILITY	TO SUPPORT RESEARCH FOR TECHNOLOGY USED IN THE FIGHT AGAINST CANCER	472,190	
EXVADE BIOSCIENCE	C/O NASSIR MOHAMMAD 380A ATLANTA, GA 30313	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	250,000	
FIRST STEP STAFFING	236 AUBURN AVENUE SUITE 203 ATLANTA, GA 3032609	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	510,462	
FLORIDA ATLANTIC UNIVERSITY FOUNDATION	770 ROLANDS ROAD SUITE 295 BOCA RATON, FL 33431	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	2,250,000	
FLORIDA EDUCATION FOUNDATION	525 WEST GAINES STREET SUITE 1574 TALLAHASSEE, FL 323096533	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
FOCUS PROJECT THE	6505 WILSHIRE BOULEVARD SUITE 500 LOS ANGELES, CA 900484906	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	5,250,000	
FOUNDATION FOR DEFENSE OF DEMOCRACIES	1800 N ST NW STE 800 S WASHINGTON, DC 200365876	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	3,334,510	
FOUNDATION FOR JEWISH CAUSE	253 WEST 35TH STREET 4TH FLOOR NEW YORK, NY 100011907	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	250,000	
FREEDOM FOUNDATION	PO BOX 552 OLYMPIA, WA 98507	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	150,000	
FRIENDS OF ELET	641 LEXINGTON AVENUE FL 20 NEW YORK, NY 10022	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,378,000	
FRIENDS OF THE ISRAELI DEFENSE FORCES	333 SANDY SPRINGS CIRCLE NE ALPHARETTA, GA 30028	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	333,334	
FUND FOR AMERICAN STUDIES THE	1706 N HAMPSHIRE AVE SUITE 400 WASHINGTON, DC 200092502	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	25,000	
GEORGIA AQUARIUM	228 BAKER STREET NW ATLANTA, GA 303131809	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	366,667	
GEORGIA CHARTER SCHOOLS ASSOCIATION LENOX CENTER	3355 LENOX ROAD SUITE 440 ATLANTA, GA 30328	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
GEORGIA COMMISSION ON THE HOLOCAUST	6110 BLUE STONE ROAD SANDY SPRINGS, GA 30328	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	240,000	
GEORGIA INTERNATIONAL LAW ENFORCEMENT EXCHANGE	ONE PARK PLACE SUITE 533 ATLANTA, GA 30303	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	150,000	
GEORGIA RESEARCH ALLIANCE	270 PEACHTREE STREET SUITE 2200 ATLANTA, GA 30303	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	445,221	
GEORGIA STATE UNIVERSITY RESEARCH FOUNDATION	58 EDGEWOOD AVENUE 3RD FLOOR ATLANTA, GA 303292921	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,440,000	
GEORGIA TECH FOUNDATION	760 SPRING ST NW SUITE 400 ATLANTA, GA 303081028	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,078,605	
GEORGIA TECH RESEARCH CORPORATION	926 DALNEY STREET NW ATLANTA, GA 30329415	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,550,000	
GRADY HEALTH FOUNDATION	191 PEACHTREE STREET SUITE 820 ATLANTA, GA 303031755	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	400,000	
GRATTITUDEAMERICA	PO BOX 16956 FERNANDINA BEACH, FL 320353133	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	200,000	
HANDS ON ATLANTA	600 MEANS STREET NW SUITE 100 ATLANTA, GA 303183799	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,000,000	
HAROLD GRINSPOON FOUNDATION	67 HUNT STREET SUITE 100 AGAWAM, MA 010011913	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	50,000	
HASBARA FELLOWSHIPS	228 PARK AVE S 94319 NEW YORK, NY 10003	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	25,000	
HEALTH CONNECTION SOUTH	PO BOX 81373 SMYRNA, GA 300838723	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	150,000	
HEBREW AT THE CENTER	350 COCHITUATE RD EAST WING 4TH FLOOR SUITE 25 WASHINGTON, DC 200174600	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	5,000	
HEBREW ORDER OF DAVID FOUNDATION	300 NELL COURT ATLANTA, GA 303422474	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	8,900,000	
HILLET INTERNATIONAL CHARLES AND LYNN SCHUSTERMAN	800 EIGHTH STREET NW WASHINGTON, DC 200013724	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	3,718,410	
HILLES OF GEORGIA	1100 SPRING STREET NW SUITE 810 ATLANTA, GA 30309	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,000,000	
HONEYMOON ISRAEL FOUNDATION	2406 MT VERNON RD SUITE 130 DUNWOODY, GA 30338	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	624,825	
HOOPER INSTITUTION AT COLUMBIA UNIVERSITY	434 GALVEZ MALL STANFORD, CA 943056003	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	25,000	
IAN'S FRIENDS FOUNDATION	453 KANSAS DRIVE ATLANTA, GA 303274343	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	2,610,853	
ICENTER THE	1500 REVERA DRIVE SUITE 202 BETHESDA, MD 208144488	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,300,000	
IMPACTBROOK, IL	600621585	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	250,000	
IN THE CITY CAMPS	2837 N DUNDON HILLS ROAD SUITE 146 ATLANTA, GA 30329	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	410,000	
INCOMUNITY	3301 BUCKEYE RD SUITE 700 ATLANTA, GA 303414236	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	113,379	
INSTITUTE FOR CURRICULUM SERVICES	131 STEUART ST STE 205 SAN FRANCISCO, CA 94105	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	500,000	
INSTITUTE FOR HUMAN STUDIES	VERNON SMITH HALL 1ST FLOOR 3434 NEW YORKTON BOULEVARD ARLINGTON, VA 22201	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
INTERNATIONAL SECURITY	1717 K STREET SUITE 900 WASHINGTON, DC 20006	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	40,000	
INTERNATIONAL ORPHAN CARE	23332 MILL CREEK DR STE 210 DOLANVILLE, PA 168631679	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
ISRAELI EMERGENCY ALLIANCE DOA ALUMNI FOR CAMPUS FAIRNESS	161 EAST 56TH ST 2ND FLOOR NEW YORK, NY 10022	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,500,000	
ISRAEL ON CAMPAIGN COALITION	PO BOX 34648 WASHINGTON, DC 20043	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,360,000	
ITREK	1460 BROADWAY NEW YORK, NY 100367329	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	20,000	
JACOBS ADDER	407 HARDSCHACK RD ROSWELL, GA 300751417	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
JERFELLS COUNTRY	108 BEEKHIRE RD RICHMOND, VA 23221	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	175,000	
JEWISH COMMUNITY LEGACY PROJECT	5256 WEATHERWOOD TRCE MARIETTA, GA 300671749	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	130,000	
JEWISH EDUCATION CENTER OF SOUTH FLORIDA	500 N SPANISH RIVER BLVD STE 15-163 BOCA RATON, FL 33431	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	15,700,000	
JEWISH EDUCATION PROJECT	520 8TH AVE 15TH FLOOR NEW YORK, NY 100186507	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	163,000	
JEWISH EDUCATIONAL LOAN FUND	4549 CHAMBLEE DUNWOODY ROAD ATLANTA, GA 303386210	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	450,309	
JEWISH FAMILY & CAREER SERVICE	1440 SPRING STREET ATLANTA, GA 303291852	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	1,275,000	
JEWISH FEDERATION OF GREATER ATLANTA	1440 SPRING STREET ATLANTA, GA 303291852	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	462,500	
JEWISH FEDERATION OF SOUTH PALM BEACH	9501 DONNA KLEIN BLVD BOCA RATON, FL 334811756	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	175,500	
JEWISH FERTILITY FOUNDATION	2837 N DUNDON HILLS ROAD SUITE 146 ATLANTA, GA 30329	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	410,000	
JEWISH FRIENDS NETWORK	150 WEST 30TH STREET SUITE 900 NEW YORK, NY 10001	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	167,000	
JEWISH GRANDPARENTS NETWORK	PO BOX 566294 SANDY SPRINGS, GA 31156	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	150,000	
JEWISH HOME LIFE	3150 HOWELL MILL RD NW ATLANTA, GA 303272108	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	605,333	
JEWISH INSTITUTE FOR NATIONAL SECURITY OF AMERICA	1101 14TH STREET NW SUITE 1030 WASHINGTON, DC 200055635	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	185,000	
JEWISH KIDS GROUPS	675 PONCE DE LEON AVE ATLANTA, GA 30308	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	5,000	
JEWISH NATIONAL FUND - USA	831 BEACON STREET SUITE 272 NEWTON, MA 02459	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	200,000	
JEWISH NEWS SYNDICATE	3810 GLASGOW RD MARIETTA, GA 30062	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	100,000	
JEWISH CHRISTIAN DISCOVERY CENTER	3810 GLASGOW RD MARIETTA, GA 30062	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	2,000,000	
JEWISH CREATORS NETWORK FOUNDATION	15455 N DALLAS PARKWAY SUITE 600 ADDISON, TX 75016760	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	25,000	
JOHNNY MAC SOLDIERS FUND	42395 RYAN ROAD SUITE 112-242 ASHBURN, VA 20148	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	25,000	
JPRO NETWORK	25 BROADWAY SUITE 1700 NEW YORK, NY 100041010	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	87,500	
JUNIOR ACHIEVEMENT OF GEORGIA	275 NORTHSIDE DRIVE NW ATLANTA, GA 303144600	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	941,500	
JUNIOR ACHIEVEMENT USA	12320 ORACLE BLVD SUITE 310 COLORADO SPRINGS, CO 80921	NONE	501(C)(3)	TO SUPPORT THE EXEMPT PURPOSE OF THE RECIPIENT ORGANIZATION	150,000	
KAVOD	820 S MONACO PKWY SUITE 234 DENVER, CO 80224					

Part XV-A

Unrelated business income

Excluded by section 512, 513, or 514

(e)
Related or exempt
function income
(See
instructions.)

(a)
Business
code

(b)
Amount

(c)
Exclusion code

(d)
Amount

a _____

b _____

C _____

d _____

e _____

f _____

g Fees and contracts from government agencies

2 Membership dues and assessments

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

• • •

5 Net rental income or (loss) from real estate:

a Debt-financed property.

b Not debt-financed property. . . .

6 Net rental income or (loss) from personal property

7 Other investment income

8 Gain or (loss) from sales of assets other than inventory

9 Net income or (loss) from special events:

10 Gross profit or (loss) from sales of inventory

11 Other revenue: **a** _____

b _____

C _____

d _____

e _____

12 Subtotal. Add columns (b), (d), and (e) . .

13 Total. Add line 12, columns (b), (d), and (e).	13	<u>-2,450,018</u>
(See worksheet in line 13 instructions to verify calculations.)		

Part XV-B

Line No.

▼

Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Part XVI

Yes

1a(1)

1a(2)

1b(1)

1b(2)

1b(3)

1b(4)

1b(5)

1b(6)

1c

[illegible]☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

May the IRS discuss this return with the preparer shown below?
See instructions. ☐ Yes ☐ No

2023-11-13

Title

See instructions. ☐ Yes ☐ No

DULUTH, GA 30097

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B (Form 990) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047
		2022
Name of the organization THE MARCUS FOUNDATION INC		Employer identification number 58-1815651

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. 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 990PF, 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 THE MARCUS FOUNDATION INC	Employer identification number 58-1815651
---	--

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	BERNARD MARCUS 1266 W PACES FERRY RD 615 ATLANTA, GA 30327	 \$ 79,800,000	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
2	BERNARD MARCUS 1266 W PACES FERRY RD 615 ATLANTA, GA 30327	 \$ 25,536,700	☒ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
.			☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.			☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.			☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.			☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
.			☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization THE MARCUS FOUNDATION INC	Employer identification number 58-1815651
---	--

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
2	70000 SHARES OF HOME DEPOT STOCK @ 364.81 PER SHARE	\$ 25,536,700	2022-01-31
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	

Name of organization THE MARCUS FOUNDATION INC	Employer identification number 58-1815651
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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 information once. See instructions.) ► \$ _____

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	
(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	
(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	
(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	

Additional Data

[Return to Form](#)

Software ID:

Software Version:

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC
EIN: 58-1815651

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	70,280	35,140		35,140

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
OFFICE FURNITURE	2002-04-06	34,632	24,242	SL	7.000000000000	0	0		
OFFICE FURNITURE	2002-10-04	1,639	1,147	SL	7.000000000000	0	0		
OFFICE FURNITURE	2002-10-04	803	562	SL	7.000000000000	0	0		
OFFICE FURNITURE	2002-10-04	9,712	6,798	SL	7.000000000000	0	0		
OFFICE FURNITURE	2002-10-31	1,572	1,100	SL	7.000000000000	0	0		
BOARDROOM MATS	2003-01-29	2,410	1,687	SL	5.000000000000	0	0		
BOARDROOM FURNITURE	2003-01-31	36,924	25,847	SL	7.000000000000	0	0		
BOOKCASES	2003-03-31	1,405	983	SL	7.000000000000	0	0		
TABLES	2003-06-10	1,095	547	SL	7.000000000000	0	0		
ROLLING CART	2003-06-26	1,971	985	SL	7.000000000000	0	0		
BOARDROOM FURNITURE	2003-07-09	28,253	14,126	SL	7.000000000000	0	0		
BOARDROOM FURNITURE	2003-09-24	15,000	7,500	SL	7.000000000000	0	0		
LHI	2004-12-31	871,353	871,353	SL	11.000000000000	0	0		
OFFICE FURNITURE	2004-06-18	2,000	1,000	SL	7.000000000000	0	0		
OFFICE EQUIPMENT	2004-06-29	6,485	3,242	SL	7.000000000000	0	0		
OFFICE EQUIPMENT	2004-08-02	4,701	2,350	SL	7.000000000000	0	0		
CORP ENVIRONMENTS FURNITURE	2004-12-01	23,606	11,803	SL	7.000000000000	0	0		
BC GROUP FURNITURE	2004-12-20	15,597	7,798	SL	7.000000000000	0	0		
CHINA/FLATWARE	1999-01-21	2,082	2,082	SL	5.000000000000	0	0		
LHI	2004-12-31	271,044	271,044	SL	11.000000000000	0	0		
LHI	2005-06-01	29,501	29,501	SL	10.580000000000	0	0		
LHI	2005-12-31	54,490	54,490	SL	10.000000000000	0	0		
LHI	2005-12-31	32,168	32,168	SL	10.000000000000	0	0		
FURNITURE	2005-01-27	8,601	8,601	SL	7.000000000000	0	0		
FURNITURE	2005-02-09	620	620	SL	7.000000000000	0	0		
FURNITURE	2005-03-28	3,766	3,766	SL	7.000000000000	0	0		
FURNITURE	2005-04-04	21,638	21,638	SL	7.000000000000	0	0		
OFFICE EQUIPMENT	2005-04-18	12,768	12,768	SL	7.000000000000	0	0		
FURNITURE	2005-04-18	2,655	2,655	SL	7.000000000000	0	0		
OFFICE FURNISHINGS	2005-06-02	2,875	2,875	SL	7.000000000000	0	0		
FURNITURE	2005-06-15	35,143	35,143	SL	7.000000000000	0	0		
FURNITURE	2005-07-12	2,349	2,349	SL	7.000000000000	0	0		
FURNITURE	2005-08-23	13,951	13,951	SL	7.000000000000	0	0		
FURNISHINGS	2005-09-21	2,514	2,514	SL	7.000000000000	0	0		
FURNITURE - WORKSTATION	2006-08-30	4,871	4,871	SL	7.000000000000	0	0		
LHI	2006-09-07	70,012	47,977	SL	9.330000000000	0	0		
OFFICE FURNISHINGS	2017-03-31	5,369	3,644	SL	7.000000000000	767	0		
AVI SYSTEM OFFICE HUB	2021-08-23	30,353	2,529	SL	5.000000000000	6,071	0		
LHI	2021-12-31	53,001		SL	7.080000000000	7,483	0		
KITCHEN APPLIANCES	2022-05-02	7,907		SL	5.000000000000	1,054	0		
LHI	2022-12-31	39,086		SL	10.000000000000	0	0		
LHI - 3RD FLOOR - LOBBY BATHROOM	2022-02-24	76,710		SL	7.420000000000	8,619	0		
LHI - 3RD FLOOR - KITCHEN, CARPET, WINDOW TREATMENTS	2022-08-25	102,588		SL	7.080000000000	4,828	0		
LHI - 2ND FLOOR	2022-12-31	50,240		SL	10.000000000000	0	0		

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Election: THE FOUNDATION ELECTS TO TREAT THE DISTRIBUTIONS BELOW PURSUANT TO IRC 4942(G)(3) SUCH THAT THEY QUALIFY AS IRC 170(B)(1)(A)(VII) CHARITABLE DISTRIBUTIONS FOR THE DONOR IN 2022 UNDER IRC 170(B)(1)(F)(II).AS REQUIRED UNDER 4942(G)(3) THESE CONTRIBUTED FUNDS -(I) HAVE BEEN DISTRIBUTED AS PART OF THE CURRENT TAX YEAR'S DISTRIBUTIONS,(II) ARE QUALIFYING DISTRIBUTIONS UNDER IRC 4942(G)(1)(A), AND(III) ARE DISTRIBUTIONS THAT UNDER THE ELECTION BELOW ARE BEING MADE OUT OF CORPUS, AND ADEQUATE RECORDS AND EVIDENCE FROM THE FOUNDATION SHOWING THAT THESE QUALIFYING DISTRIBUTIONS HAVE BEEN MADE BY THE FOUNDATION HAVE BEEN DELIVERED TO THE DONOR.THE FOUNDATION ELECTS TO TREAT THE FOLLOWING CURRENT YEAR DISTRIBUTIONS AS CURRENT TAX YEAR CORPUS DISTRIBUTIONS PURSUANT TO IRC 4942(H)(2) AND REG. 53.4942(A)-3(D)(2).2022 QUALIFYING DISTRIBUTIONS: \$105,336,700THIS ELECTION IS MADE BY FOUNDATION MANAGER, DOUGLAS DINAPOLI, CFO, AS PART OF THE ELECTRONICALLY FILED ANNUAL RETURN.

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC
EIN: 58-1815651

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
EXVADE BIOSCIENCE	380A NORTHYARDS BLVD NW ATLANTA, GA 30313	2021-08-20	944,380	FUNDS WILL BE USED TO SUPPORT CONTINUING RESEARCH WORK ON A TUMOR MONORAIL DEVICE (A MININALLY INVASIVE DRAIN TUMOR "EXVOSION" DEVICE).	944,380	NO FUNDS HAVE BEEN DIVERTED.		2022-06-30	ALL GRANT FUNDS WERE EXPENDED FOR MEDICAL RESEARCH PURPOSES AND THAT GRANT FUNDS WERE NOT USED TO ATTEMPT TO INFLUENCE LEGISLATION OR THE OUTCOME OF ANY SPECIFICPUBLIC ELECTION; TO CARRY ON, DIRECTLY OR INDIRECTLY, ANY VOTER REGISTRATION DRIVE; TO MAKE GRANTS TO INDIVIDUALS OR TO OTHER NONCHARITABLE ORGANIZATIONS OR UNDERTAKE ANY ACTIVITIES FOR A NON-CHARITABLE PURPOSE.THE GRANTOR HAS NO REASON TO DOUBT THE ACCURACY OR RELIABILITY OF THE REPORT FROM THE GRANTEE; THEREFORE, NO INDEPENDENT VERIFICATION OF THE REPORT WAS MADE.

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	49,904,645	49,904,645

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
OTHER INVESTMENTS	FMV	34,502,163	34,502,163

Name: THE MARCUS FOUNDATION INC
EIN: 58-1815651

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE FURNITURE	34,632	34,632	0	
OFFICE FURNITURE	1,639	1,639	0	
OFFICE FURNITURE	803	803	0	
OFFICE FURNITURE	9,712	9,712	0	
OFFICE FURNITURE	1,572	1,572	0	
BOARDROOM MATS	2,410	2,410	0	
BOARDROOM FURNITURE	36,924	36,924	0	
BOOKCASES	1,405	1,405	0	
TABLES	1,095	1,095	0	
ROLLING CART	1,971	1,971	0	
BOARDROOM FURNITURE	28,253	28,253	0	
BOARDROOM FURNITURE	15,000	15,000	0	
LHI	871,353	871,353	0	
OFFICE FURNITURE	2,000	2,000	0	
OFFICE EQUIPMENT	6,485	6,485	0	
OFFICE EQUIPMENT	4,701	4,701	0	
CORP ENVIRONMENTS FURNITURE	23,606	23,606	0	
BC GROUP FURNITURE	15,597	15,597	0	
CHINA/FLATWARE	2,082	2,082	0	
LHI	271,044	271,044	0	
LHI	29,501	29,501	0	
LHI	54,490	54,490	0	
LHI	32,168	32,168	0	
FURNITURE	8,601	8,601	0	
FURNITURE	620	620	0	
FURNITURE	3,766	3,766	0	
FURNITURE	21,638	21,638	0	
OFFICE EQUIPMENT	12,768	12,768	0	
FURNITURE	2,655	2,655	0	
OFFICE FURNISHINGS	2,875	2,875	0	
FURNITURE	35,143	35,143	0	
FURNITURE	2,349	2,349	0	
FURNITURE	13,951	13,951	0	
FURNISHINGS	2,514	2,514	0	
FURNITURE - WORKSTATION	4,871	4,871	0	
LHI	70,012	47,977	22,035	
OFFICE FURNISHINGS	5,369	4,411	958	
AVI SYSTEM OFFICE HUB	30,353	8,600	21,753	
LHI	53,001	7,483	45,518	
KITCHEN APPLIANCES	7,907	1,054	6,853	
LHI	39,086	0	39,086	
LHI - 3RD FLOOR - LOBBY BATHROOM	76,710	8,619	68,091	
LHI - 3RD FLOOR - KITCHEN, CARPET, WINDOW TREATMENTS	102,588	4,828	97,760	
LHI - 2ND FLOOR	50,240	0	50,240	

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	116,500	0		116,500

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Total Mortgage Amount:

Item No.	1
Lender's Name	SUNTRUST BANK
Lender's Title	
Relationship to Insider	NONE
Original Amount of Loan	140,000
Balance Due	423,773,480
Date of Note	2007-07
Maturity Date	2023-03
Repayment Terms	REVOLVING, INTEREST AT SOFR+
Interest Rate	0.986000000000
Security Provided by Borrower	PLEDGE OF HOME DEPOT STOCK
Purpose of Loan	
Description of Lender Consideration	
Consideration FMV	

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
REAL ESTATE HELD FOR DONATION	2,131,263		
ROU ASSET - OPERATING LEASES		2,497,841	2,497,841

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Description	Amount
BOOK/TAX DIFFERENCES ON RECOGNITION OF K-1 INCOME	421,115
BOOK/TAX DIFFERENCES ON ROU ASSETS	404,259
UNREALIZED DEPRECIATION ON INVESTMENT PORTFOLIO	7,574,427

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COMPUTER SUPPORT	187,557	18,756		168,801
DUES AND SUBSCRIPTIONS	19,911	0		19,911
EDUCATION & TRAINING	5,131	0		5,131
EQUIPMENT EXPENSE	20,406	2,041		18,365
INSURANCE	55,352	5,535		49,817
MISCELLANEOUS	245,231	0		245,231
OFFICE SUPPLIES AND EXPENSES	84,322	8,432		75,890
POSTAGE AND SHIPPING	3,681	0		3,681
PROGRAM RELATED EXPENSES	258,088	0		258,088
ADMINISTRATIVE EXPENSE	103,595	10,360		93,235
AUTO EXPENSE	25,699	0		25,699
BANK CHARGES	2,363	0		2,363
BOOK EXPENSE	331,893	0		331,893

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ROYALTIES	89,250	89,250	89,250

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Description	Amount
BOOK/TAX DIFFERENCES ON GRANTS PAID	3,543,985

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Description	Beginning of Year - Book Value	End of Year - Book Value
PAYABLE TO AFFILIATE	180,945	497,801
ACCRUED INTEREST PAYABLE	903,620	4,133,622
OTHER LIABILITIES	16,070	0
OPERATING LEASE LIABILITY - CURRENT PORTION	0	370,977
OPERATING LEASE LIABILITY, NET OF CURRENT PORTION	0	2,531,123

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**TY 2022 IRS 990 e-File
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Name: THE MARCUS FOUNDATION INC
EIN: 58-1815651

Borrower's Name	Relationship to Insider	Original Amount of Loan	Balance Due	Date of Note	Maturity Date	Repayment Terms	Interest Rate	Security Provided by Borrower	Purpose of Loan	Description of Lender Consideration	Consideration FMV
TAPESTRY SCHOOL INC	NONE	3,543,985	0	2015-04	2022-07	NONINTEREST BEARING, LINE OF CREDIT	0 %	CERTAIN REAL PROPERTY	LINE OF CREDIT	CERTAIN REAL PROPERTY	0
EARLITEC DIAGNOSTICS INC		2,800,000	10,522,066	2020-03	2032-03	INTEREST BEARING, LINE OF CREDIT	800.0000000000 %	CERTAIN ASSETS, INCLUDING INTELLECTUAL PROPERTY	LINE OF CREDIT	CERTAIN ASSETS, INCLUDING INTELLECTUAL PROPERTY	10,522,066

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	168,713	168,713		0
OTHER PROFESSIONAL FEES	447,900	0		447,900

TY 2022 IRS 990 e-File Render

Name: THE MARCUS FOUNDATION INC

EIN: 58-1815651

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	107,771	0		0
OTHER TAX & LICENSES	6,369	0		6,369
PAYROLL TAX	137,062	13,706		123,356