

Return of Private Foundation

Department of the Treasury Internal Revenue Service

or Section 4947(a)(1) Trust Treated as Private Foundation
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information

2023

Open to Public Inspection

For the calendar year 2023, or tax year beginning January 01, 2023, and ending December 31, 2023

Name of foundation: J MARBERGER STUART FOUNDATION INC
Employer identification number: 11-3151120
Number and street: 149 CLEARWATER DR
Room/suite:
Telephone number: (845) 707-4619
City or town, state or province, country, and ZIP or foreign postal code: MONTICELLO, NY 12701-6804
Check all that apply: Initial return, Final return, Address change, Initial return of a former public charity, Amended return, Name change
Check type of organization: Section 501(c)(3) exempt private foundation
Fair market value of all assets at end of year: \$100
Accounting method: Cash

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12), Operating and Administrative Expenses (13-26), and Summary (27-29).

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	316	100	100
	2 Savings and temporary cash investments	0	0	0
	3 Accounts receivable	0		
	Less: allowance for doubtful accounts	0	0	0
	4 Pledges receivable	0		
	Less: allowance for doubtful accounts	0	0	0
	5 Grants receivable	0	0	0
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use	0	0	0
	9 Prepaid expenses and deferred charges	0	0	0
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis	0		
Less: accumulated depreciation (attach schedule)	0			
12 Investments—mortgage loans	0	0	0	
13 Investments—other (attach schedule)				
14 Land, buildings, and equipment: basis				
accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	316	100	100	
Liabilities	17 Accounts payable and accrued expenses	0	0	
	18 Grants payable	0	0	
	19 Deferred revenue	0	0	
	20 Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input type="checkbox"/>			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <input checked="" type="checkbox"/>			
	26 Capital stock, trust principal, or current funds	316	100	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	0	0	
29 Total net assets or fund balances (see instructions)	316	100		
30 Total liabilities and net assets/fund balances (see instructions)	316	100		

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	316
2	Enter amount from Part I, line 27a	2	(216)
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	100
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	100

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				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(j) FMV as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2		
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		0

Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 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)		1		0
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		0
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		0
6 Credits/Payments:				
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a		0	
b Exempt foreign organizations—tax withheld at source	6b			
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		
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		0
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10		0
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax Refunded		11		0

Part VI-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?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1b 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.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1c Did the foundation file Form 1120-POL for this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ <u>0</u> (2) On foundation managers. \$ <u>0</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ <u>0</u>		
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.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4b If "Yes," has it filed a tax return on Form 990-T for this year?	<input type="checkbox"/>	<input type="checkbox"/>
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <u>NY</u>		
8b 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 <i>General Instruction G</i> ? If "No," attach explanation	<input type="checkbox"/>	<input type="checkbox"/>
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 2023 or the tax year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>www.dragonaward.org</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14 The books are in care of <u>Jane Stuart</u> Telephone no. <u>(845) 707-4619</u> Located at <u>149 CLEARWATER DR , MONTICELLO , NY</u> ZIP+4 <u>12701-6804</u>		
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	<input type="checkbox"/>	
16 At any time during calendar year 2023, 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	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(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"/>	<input checked="" type="checkbox"/>
(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"/>	<input checked="" type="checkbox"/>
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	<input type="checkbox"/>	<input type="checkbox"/>
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
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 2023?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If "Yes," list the years 20____, 20____, 20____, 20____		
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.)	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes," did it have excess business holdings in 2023 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2023.)	<input type="checkbox"/>	<input type="checkbox"/>
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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 2023?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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:

	Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(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"/>	<input checked="" type="checkbox"/>
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(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"/>	<input checked="" type="checkbox"/>
(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"/>	<input checked="" type="checkbox"/>
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.	<input type="checkbox"/>	<input type="checkbox"/>
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/>	<input type="checkbox"/>
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/>	<input type="checkbox"/>
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"/>	<input checked="" type="checkbox"/>

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

1 List all officers, directors, trustees, and 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
Jane Stuart 149 Clearwater Dr, ,Monticello ,NY 12701	President, Director 2	0	0	0
Richard Stuart 149 Clearwater Dr, ,Monticello ,NY 12701	Director, CFO 2	0	0	0
Louise Stuart Owen 2801 Ashton Ter ,Oviedo ,FL 32765	Director 2	0	0	0

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
NONE				
Total number of other employees paid over \$50,000				

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
NONE		
Total number of others receiving over \$50,000 for professional services		

Part VIII-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.		Expenses
1	Information about the Dragon Award given to E-Z Magazine, The International Brotherhood of Magicians and the Society of American Magicians	110
2		
3		
4		

Part VIII-B 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	none	0
2		
All other program-related investments. See instructions.		
3	none	0
Total. Add lines 1 through 3		0

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	0
b	Average of monthly cash balances	1b	171
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	171
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	171
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	3
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	168
6	Minimum investment return. Enter 5% (0.05) of line 5	6	8

Part X		Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here <input type="checkbox"/> and do not complete this part.)	
1	Minimum investment return from Part IX, line 6	1	8
2a	Tax on investment income for 2023 from Part V, line 5	2a	0
b	Income tax for 2023. (This does not include the tax from Part V)	2b	0
c	Add lines 2a and 2b	2c	0
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	8
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	8
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	8

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	110
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	110

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				8
2 Undistributed income, if any, as of the end of 2023:				
a Enter amount for 2022 only			0	
b Total for prior years: 20 ____, 20 ____, 20 ____		0		
3 Excess distributions carryover, if any, to 2023:				
a From 2018	10,981			
b From 2019	82			
c From 2020	0			
d From 2021	0			
e From 2022	0			
f Total of lines 3a through e	11,063			
4 Qualifying distributions for 2023 from Part XI, line 4: \$ 110				
a Applied to 2022, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2023 distributable amount				8
e Remaining amount distributed out of corpus	102			
5 Excess distributions carryover applied to 2023 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	11,165			
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 2022. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)	0			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)	10,981			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	184			
10 Analysis of line 9:				
a Excess from 2019	82			
b Excess from 2020	0			
c Excess from 2021	0			
d Excess from 2022	0			
e Excess from 2023	102			

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 2023, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2023	(b) 2022	(c) 2021	(d) 2020	
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 XIV 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).)
- 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:

Part XIV 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
--	--	--------------------------------------	-------------------------------------	--------

a Paid during the year

--	--	--	--	--

Total **3a**

b Approved for future payment

--	--	--	--	--

Total **3b**

Form 990PF Statements**2023**

Name of the Organization J MARBERGER STUART FOUNDATION INC	Employer identification number 11-3151120
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Statement name: **Other Expenses - Part I Line 23**

Explanation:	Legal notice and filing fee
Revenue and Expenses per books:	\$198
Net Investment Income:	\$0
Adjusted Net Income:	\$0
Disbursements for Charity Purpose:	\$0

Statement name: **Tax under section 511 - Part V Line 2**

Explanation:	n/a
Amount:	\$0

LEGAL NOTICES

application by either mail, fax or email. Military voter registration application forms must be received in the office of the District Clerk no later than 5:00 p.m. on April 25, 2024.

AND FURTHER NOTICE IS HEREBY GIVEN, that military voters who are qualified voters of the Monticello Central School District may request an application for a military ballot from the District Clerk in person, by mail at 60 Jefferson Street, Suite 3, Monticello, New York, by email to jlybolt@k12mcsd.net, or fax sent to (845)794-7710. In such request, the military voter may indicate their preference for receiving the application by mail, fax or email. A military voter must return the original military ballot application by mail or in person to the office of the District Clerk at 60 Jefferson Street, Suite 3, Monticello, New York. In order for a military voter to be issued a military ballot, a valid military ballot application must be received in the office of the District Clerk no later than 5:00 p.m., on April 25, 2024. Military ballot applications received in accordance with the foregoing will be processed in the same manner as a non-military ballot application under Section 2018-a of the Education Law. The application for military ballot may include the military voter's preference for receipt of the military ballot by mail, fax, or email.

AND FURTHER NOTICE IS HEREBY GIVEN, a military voter's original military ballot must be returned by mail or in person to the office of the District Clerk at 60 Jefferson Street, Suite 3, Monticello, New York. Military ballots shall be canvassed if they are received by the District Clerk before the close of polls on May 21, 2024 showing a cancellation mark of the United States Postal Service or a foreign country's postal service, or showing a dated endorsement of receipt by another agency of the United States Government; or received not later than 5:00 p.m. on May 21, 2024 and signed and dated by the military voter and one witness hereto, with a date which is ascertained to be not later than the day before the election.

AND FURTHER NOTICE IS HEREBY GIVEN that the boundaries, registration places and polling places of the election districts of said school district for the May 21, 2024 annual budget vote and election are as follows:

SCHOOL ELECTION DISTRICT NO. 5: all that portion of Monticello Central School District lying in the Town of Forestburgh. Polling and registration place at the Forestburgh Town Hall, 332 King Road, Forestburgh, New York.

SCHOOL ELECTION DISTRICT NO. 4: all that portion of Monticello Central School District lying in the Town of Thompson and described as follows: beginning at the point where the Town lines of Fallsburg, Mamakating and Thompson intersect and run thence Southwesterly along the East bounds of the Town of Thompson to the point where the Town lines of Thompson, Mamakating and Forestburgh intersect; thence Westerly along the South bounds of the Town of Thompson to a point in the center of Town Road #83 or Murrans Road-Rose Valley; thence Northerly along the center of Town Road #33 to a point in the center of State Highway Route 17; thence Easterly along the center of Route 12 to a point opposite the center of Town Road #60 or Towner Road; thence Northerly along the center of Town Road #60 to a point on the North bounds of the Town of Thompson; thence Easterly along the North bounds of the Town of Thompson to a point in the center of the Neversink River; thence Easterly along the center of the Neversink River to a point on the North bounds of the Town of Thompson; thence Easterly along the North bounds of the Town of Thompson; to a point or place of beginning, with polling place and registration place at the Rock Hill Fire Department Building, 61 Glen Wild Road, Rock Hill, New York.

SCHOOL ELECTION DISTRICT NO. 3: all that portion of Monticello Central School District lying in the Town of Mamakating. Polling and registration place at the Emma Chase School, 28 Pennsylvania Avenue, Westboro, New York.

SCHOOL ELECTION DISTRICT NO. 2: all that portion of the Monticello Central School District lying in the Town of Bethel. Polling and registration place at the Dr. Duggan Community Center, 3460 Route 55, White Plains, New York.

SCHOOL ELECTION DISTRICT NO. 1: all the remainder of Monticello Central School District. Polling and registration place at the Robert J. Herlihy Middle School, 45 Breakey Ave., Monticello, New York.

LEGAL NOTICES

AUCTION NOTICE
UNITS FOR AUCTION
UNIT # 0849
MICHAEL BOCK
THE CONTENTS OF EACH UNIT WILL BE SOLD AS A LOT. PAYMENTS WILL BE CASH ONLY.
HOUSEHOLD MISCELLANEOUS ITEMS.
ANY PERSON PURCHASING A UNIT WILL LEAVE \$100.00 CASH DEPOSIT. THE ABOVE CUSTOMERS CAN HOLD OFF AUCTIONS PROCEEDING BY PAYING TOTAL AMOUNT DUE BY SALE DATE.
SALE DATE MAY 16 TH 2024 AT 12 NOON AND EVERYDAY THEREAFTER UNTIL SALE IS COMPLETE.
122729

LEGAL NOTICE
Notice is hereby given that the Annual Meeting of the White Sulphur Springs Cemetery Corporation will be held on Monday, May 20th, 2024, at 7 p.m., at the White Sulphur Springs United Methodist Church Hall, White Sulphur Springs, New York. Meeting is open to the public.
Nancy Esposito,
Acting Secretary
122918

LEGAL NOTICE
NOTICE OF FORMATION OF NEW YORK LIMITED LIABILITY COMPANY
The name of the Limited Liability Company is CASTLEBORO LLC (the Company); the date of filing of the Articles of Organization with the New York Department of State was April 22, 2024; the County in New York in which the office of the Company is located is Sullivan County, New York; the duration of the Company is perpetual; the Secretary of State has been designated as agent of the Company upon whom process may be served and the Secretary of State shall mail a copy of any process against

LEGAL NOTICES

32 Mahogany Lane, Liberty, NY 12754. Purpose: any lawful purpose.
122195

LEGAL NOTICE
NOTICE OF FORMATION OF LIMITED LIABILITY COMPANY
Name: HLPALLC
Articles of Organization filed with Secretary of State on April 9, 2024
Office Location: Sullivan County
Secretary of State of the State of New York is designated as an agent of the LLC upon whom process against it may be served. The post office address to which the Secretary of State shall mail process is: 47 Lake Dr, Swan Lake, NY 12783.
Purpose: any lawful purpose.
122158

LEGAL NOTICE
Notice of Formation of limited liability company (LLC). Name: Actual Size, LLC. Articles of Organization filed with Secretary of State of New York (SSNY) on 04/03/2024. County within this state, in which the office of the limited liability company is located: Sullivan County. Street address of principal business location is: 10 Maxwell Road, Pond Eddy, New York 12770. SSNY designated as agent of LLC upon whom process against it may be served. SSNY shall mail copy of process to Actual Size, LLC, P.O. Box 8, Pond Eddy, New York 12770. Term: Perpetual. Purpose: For any lawful purpose
122017

LEGAL NOTICE
Notice of formation of Limited Liability Company (LLC). Name: CALO FITNESS, LLC. Articles of Organization filed with the Secretary of State of New York (SSNY) on APRIL 8, 2019. Office Location: Sullivan County. SSNY designated as agent

LEGAL NOTICES

LEGAL NOTICE
Notice of Formation of limited liability company (LLC). Name: River Town Sound, LLC. Articles of Organization filed with Secretary of State of New York (SSNY) on 04/03/2024. County within this state, in which the office of the limited liability company is located: Sullivan County. Street address of principal business location is: 3434 State Route 97, Barryville, New York 12719
SSNY designated as agent of LLC upon whom process against it may be served. SSNY shall mail copy of process to River Town Sound, LLC, P.O. Box 8, Pond Eddy, New York 12770. Term: Perpetual. Purpose: For any lawful purpose
122014

LEGAL NOTICE
Notice of Formation of MANIAC CONSTRUCTION & MORE LLC. Arts. of Org. filed with NY Dept. of State on 03/10/2024. Office location: 598 New Turnpike Road, Cochection NY 12726. Sec. of State designated agent of LLC upon whom process against it may be served and shall mail process to: 598 New Turnpike Road, Cochection NY 12726 MANIAC CONSTRUCTION & MORE LLC. Purpose: any lawful purpose.
122123

LEGAL NOTICE
PUBLIC NOTICE
The J. Marberger Stuart Foundation, Inc.'s annual return is available for inspection at its principal office during regular business hours (9am to 5pm) by any citizen who requests inspection on or before December 31, 2024. The foundation's principle manager is Richard J. Stuart. The address is 149 Clearwater Drive, Monticello, NY 12701. The telephone number is (845) 707-4619.
122697