

## EXTENSION ATTACHED

OMB No 1545-0052

2007

Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2007, or tax year beginning

, 2007, and ending

G Check all that apply

Initial return

Final return

Amended return

☒

Address change

Name change

Use the IRS  
label.Otherwise,  
print  
or type.See Specific  
Instructions.

Name of foundation

THE JOHN MERCK FUND

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

2 OLIVER STREET

City or town, state, and ZIP code

BOSTON, MA 02109

A Employer identification number

23-7082558

B Telephone number (see page 10 of the instructions)

(617) 556-4120

C If exemption application is  
pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the  
85% test, check here and attach  
computation ☐E If private foundation status was terminated  
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end

of year (from Part II, col (c), line

16) \$ 220,946,079.

J Accounting method ☐ Cash ☐ Accrual☒ Other (specify) MODIFIED CASH

(Part I, column (d) must be on cash basis)

**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 page 11 of the instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>				
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	638,126.	638,126.		STMT 1
4 Dividends and interest from securities	1,452,805.	1,452,805.		STMT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	22,048,849.	STMT 12A		
b Gross sales price for all assets on line 6a	45,972,757.			
7 Capital gain net income (from Part IV, line 2)		21,717,956.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	2,253,437.	2,205,888.		STMT 3
12 Total. Add lines 1 through 11	26,393,217.	26,014,775.		
<b>Operating and Administrative Expenses</b>				
13 Compensation of officers, directors, trustees, etc.	539,000.	67,950.		471,050.
14 Other employee salaries and wages	71,500.			71,500.
15 Pension plans, employee benefits	136,412.	4,552.		131,860.
16a Legal fees (attach schedule) STMT 4	53,318.	13,340.		39,978.
b Accounting fees (attach schedule) STMT 5	110,000.	22,500.		87,500.
c Other professional fees (attach schedule) STMT 6	1,037,141.	753,913.		283,228.
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) *	290,864.	61,864.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy	42,000.			42,000.
21 Travel, conferences, and meetings	48,552.			48,552.
22 Printing and publications				
23 Other expenses (attach schedule) STMT 8	1,813,635.	1,645,957.		167,678.
24 Total operating and administrative expenses. Add lines 13 through 23	4,142,422.	2,570,076.		1,343,346.
25 Contributions, gifts, grants paid	14,682,586.			14,729,640.
26 Total expenses and disbursements. Add lines 24 and 25	18,825,008.	2,570,076.		16,072,986.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	7,568,209.			
b Net investment income (if negative, enter -0-)		23,444,699.		
c Adjusted net income (if negative, enter -0-)			-0-	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. \*\* STMT 7

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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 . . . . .				
	2	Savings and temporary cash investments . . . . .	21,556,516.	9,037,467.	9,037,467.	
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶				
	5	Grants receivable . . . . .				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶	300,000.	300,000.	STMT 9 300,000.	
	8	Inventories for sale or use . . . . .				
	9	Prepaid expenses and deferred charges . . . . .				
	10 a	Investments - U S and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule) . STMT 10	99,292,599.	103,647,587.	103,647,587.	
	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) . . . . . STMT 11	96,332,659.	107,961,025.	107,961,025.	
	14	Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶				
15	Other assets (describe ▶ )					
16	<b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .	217,481,774.	220,946,079.	220,946,079.		
Liabilities	17	Accounts payable and accrued expenses . . . . .				
	18	Grants payable . . . . .				
	19	Deferred revenue . . . . .				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule) . . . . .				
	22	Other liabilities (describe ▶ )				
23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .					
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted . . . . .	217,481,774.	220,946,079.		
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>					
	27	Capital stock, trust principal, or current funds . . . . .				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .				
	29	Retained earnings, accumulated income, endowment, or other funds . . . . .				
30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	217,481,774.	220,946,079.			
31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	217,481,774.	220,946,079.			

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

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	217,481,774.
2	Enter amount from Part I, line 27a . . . . .	2	7,568,209.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3 . . . . .	4	225,049,983.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 12	5	4,103,904.
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	220,946,079.

**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.)
<b>1a</b> SEE PART IV SCHEDULE					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(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)		
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2</b> Capital gain net income or (net capital loss) . . . . .			2	STAT 12A 21,717,956.	
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }					
<b>3</b> 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 pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8. . . . .			3		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? . . . . ☐ Yes ☒ No  
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

**1** Enter the appropriate amount in each column for each year; see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2006	14,942,250.	201,746,662.	0.074064
2005	13,711,872.	195,692,378.	0.070069
2004	13,461,994.	194,664,263.	0.069155
2003	12,131,484.	154,742,235.	0.078398
2002	10,823,314.	172,207,362.	0.062850
<b>2</b> Total of line 1, column (d) . . . . .			0.354536
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . . .			0.070907
<b>4</b> Enter the net value of noncharitable-use assets for 2007 from Part X, line 5 . . . . .			217,222,348.
<b>5</b> Multiply line 4 by line 3 . . . . .			15,402,585.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b) . . . . .			234,447.
<b>7</b> Add lines 5 and 6 . . . . .			15,637,032.
<b>8</b> Enter qualifying distributions from Part XII, line 4 . . . . .			16,072,986.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the 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 letter _____ (attach copy of ruling letter if necessary - see instructions) . . . . .			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		1	234,447.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b) . . . . .			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .		2	
3 Add lines 1 and 2 . . . . .		3	234,447.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .		4	NONE
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	234,447.
6 Credits/Payments.			
a 2007 estimated tax payments and 2006 overpayment credited to 2007 . . . . .	6a	238,198.	
b Exempt foreign organizations-tax withheld at source . . . . .	6b	NONE	
c Tax paid with application for extension of time to file (Form 8868) . . . . .	6c	160,000.	
d Backup withholding erroneously withheld . . . . .	6d		
7 Total credits and payments. Add lines 6a through 6d . . . . .	7	398,198.	
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached . . . . .	8		
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	163,751.	
11 Enter the amount of line 10 to be. Credited to 2008 estimated tax <input checked="" type="checkbox"/> 163,751. Refunded <input type="checkbox"/> . . . . .	11		

**Part VII-A Statements Regarding Activities**

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .	1a		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .	1b		X
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		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ NONE (2) On foundation managers <input checked="" type="checkbox"/> \$ NONE . . . . .			
e Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ NONE . . . . .			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .	2		X
If "Yes," attach a detailed description of the activities			
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .	3		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	4a	X	
b If "Yes," has it filed a tax return on Form 990-T for this year? . . . . .	4b	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .	5		X
If "Yes," attach the statement required by General Instruction T.			
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • 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	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV . . . . .	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input checked="" type="checkbox"/> MA, <input checked="" type="checkbox"/> NY . . . . .			
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2007 or the taxable year beginning in 2007 (see instructions for Part XIV)? If "Yes," complete Part XIV . . . . .	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses . . . . .	10		X

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

11a	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 page 20 of the instructions) . . . . .	11a		X
b	If "Yes," did the foundation have a binding written contract in effect on August 17, 2006, covering the interest, rents, royalties, and annuities described in the attachment for line 11a? . . . . .	11b	N/A	
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract? . . . . .	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .	13	X	
Website address <b>WWW.JMFUND.ORG</b>				
14	The books are in care of <b>THE JOHN MERCK FUND</b> Telephone no <b>617-556-4120</b>			
Located at <b>2 OLIVER STREET BOSTON, MA</b> ZIP + 4 <b>02109</b>				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-F in lieu of Form 1041 - Check here . . . . . N/A			
and enter the amount of tax-exempt interest received or accrued during the year . . . . .		15		

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? . . . . . <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here . . . . . <input type="checkbox"/>	1b	X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2007? . . . . .	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2007, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2007? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>_____</b>		
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 page 22 of the instructions) . . . . .	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <b>_____</b>		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2007 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 2007) . . . . .	3b	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2007? . . . . .	4b	X

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

**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b** ☐ **X**

Organizations relying on a current notice regarding disaster assistance check here ☐

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☒ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☐ **X**

If you answered "Yes" to 6b, also file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** ☐ **N/A**

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 23 of the 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
SEE STATEMENT 13		539,000.	82,334.	NONE

**2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the 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
SEE STATEMENT 17		60,000.	13,712.	NONE

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

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**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SEE STATEMENT 18		692,646.

Total number of others receiving over \$50,000 for professional services . . . . . 4

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NONE	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3 . . . . .	

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	106,243,007.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	12,140,454.
<b>c</b>	Fair market value of all other assets (see page 25 of the instructions)	<b>1c</b>	102,146,842.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	220,530,303.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	NONE
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	NONE
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	220,530,303.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	3,307,955.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	217,222,348.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	10,861,117.

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	10,861,117.
<b>2a</b>	Tax on investment income for 2007 from Part VI, line 5	<b>2a</b>	234,447.
<b>b</b>	Income tax for 2007 (This does not include the tax from Part VI)	<b>2b</b>	42,628.
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	277,075.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	10,584,042.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	47,054.
<b>5</b>	Add lines 3 and 4	<b>5</b>	10,631,096.
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	10,631,096.

**Part XII Qualifying Distributions** (see page 26 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	16,072,986.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	NONE
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	NONE
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	NONE
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	NONE
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	16,072,986.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	<b>5</b>	234,447.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	15,838,539.

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



**Part XIII Undistributed Income** (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2006	(c) 2006	(d) 2007
<b>1</b> Distributable amount for 2007 from Part XI, line 7 . . . . .				10,631,096.
<b>2</b> Undistributed income, if any, as of the end of 2006				
<b>a</b> Enter amount for 2006 only . . . . .				
<b>b</b> Total for prior years . . . . .				
<b>3</b> Excess distributions carryover, if any, to 2007				
<b>a</b> From 2002 . . . . . 2,648,219.				
<b>b</b> From 2003 . . . . . 4,567,838.				
<b>c</b> From 2004 . . . . . 3,899,885.				
<b>d</b> From 2005 . . . . . 4,425,093.				
<b>e</b> From 2006 . . . . . 5,295,288.				
<b>f</b> Total of lines 3a through e . . . . .	20,836,323.			
<b>4</b> Qualifying distributions for 2007 from Part XII, line 4 ► \$ 16,072,986.				
<b>a</b> Applied to 2006, but not more than line 2a . . .				
<b>b</b> Applied to undistributed income of prior years (Election required - see page 27 of the instructions) . . . . .				
<b>c</b> Treated as distributions out of corpus (Election required - see page 27 of the instructions) . . . . .				
<b>d</b> Applied to 2007 distributable amount . . . . .				10,631,096.
<b>e</b> Remaining amount distributed out of corpus . . .	5,441,890.			
<b>5</b> Excess distributions carryover applied to 2007 (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .	26,278,213.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .				
<b>c</b> 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 . . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions . . . . .				
<b>e</b> Undistributed income for 2006 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions . . . . .				
<b>f</b> Undistributed income for 2007 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2008 . . . . .				
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .				
<b>8</b> Excess distributions carryover from 2002 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	2,648,219.			
<b>9</b> Excess distributions carryover to 2008. Subtract lines 7 and 8 from line 6a . . . . .	23,629,994.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2003 . . . . . 4,567,838.				
<b>b</b> Excess from 2004 . . . . . 3,899,885.				
<b>c</b> Excess from 2005 . . . . . 4,425,093.				
<b>d</b> Excess from 2006 . . . . . 5,295,288.				
<b>e</b> Excess from 2007 . . . . . 5,441,890.				

4942(j)(5)

(4) Gross investment income .

**Part XV** **Supplementary Information (continued)****3 Grants and Contributions Paid During the Year or Approved for Future Payment**

<div>Recipient</div> <div>Name and address (home or business)</div>	<div>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</div>	<div>Foundation status of recipient</div>	<div>Purpose of grant or contribution</div>	<div>Amount</div>
<b>a</b> <i>Paid during the year</i>  SEE STATEMENT 19				
<b>Total</b> . . . . .			▶ <b>3a</b>	14,729,640.
<b>b</b> <i>Approved for future payment</i>  SEE STATEMENT 20				
<b>Total</b> . . . . .			▶ <b>3b</b>	1,590,000.

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

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
<b>1</b> Program service revenue:						
<b>a</b> _____						
<b>b</b> _____						
<b>c</b> _____						
<b>d</b> _____						
<b>e</b> _____						
<b>f</b> _____						
<b>g</b> Fees and contracts from government agencies						
<b>2</b> Membership dues and assessments . . . . .						
<b>3</b> Interest on savings and temporary cash investments			14	638,126.		
<b>4</b> Dividends and interest from securities . . . . .			14	1,452,805.		
<b>5</b> Net rental income or (loss) from real estate						
<b>a</b> Debt-financed property . . . . .						
<b>b</b> Not debt-financed property . . . . .						
<b>6</b> Net rental income or (loss) from personal property .						
<b>7</b> Other investment income . . . . .	900000	17,549.	18	2,235,888.		
<b>8</b> Gain or (loss) from sales of assets other than inventory	900000	330,893.	18	21,717,956.		
<b>9</b> Net income or (loss) from special events . . . . .						
<b>10</b> Gross profit or (loss) from sales of inventory . .						
<b>11</b> Other revenue <b>a</b> _____						
<b>b</b> _____						
<b>c</b> _____						
<b>d</b> _____						
<b>e</b> _____						
<b>12</b> Subtotal. Add columns (b), (d), and (e) . . . . .		348,442.		26,044,775.		
<b>13</b> <b>Total.</b> Add line 12, columns (b), (d), and (e) . . . . .					13	26,393,217.

(See worksheet in line 13 instructions on page 29 to verify calculations )

## Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]



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Department of the Treasury  
Internal Revenue Service  
OGDEN, UT 84201-0074

For assistance, call:  
1-877-829-5500

Notice Number: CP211A  
Date: September 29, 2008

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Taxpayer Identification Number:  
23-7082558

Tax Form: 990PF

Tax Period: December 31, 2007



006573

JOHN MERCK FUND  
% RICHARD W EISNER & CO LLP  
2 OLIVER ST 8TH FL  
BOSTON MA 02109-4901996

## APPLICATION FOR EXTENSION OF TIME TO FILE AN EXEMPT ORGANIZATION RETURN - APPROVED

We have received your Form 8868, Application for Extension of Time to File an Exempt Organization Return, for the return (form) and tax period identified above.

We have approved your request and have extended the due date to file your return to November 15, 2008.

Please attach a copy of this letter to your return when you file it. It is evidence that we granted an extension of time to file your return. A copy is provided for your records.

If you have any questions, please call us at the number shown above, or you may write us at the address shown at the top left of this letter.

### Reminder - You May Be Required to File Electronically

Exempt organizations may be required to file certain returns electronically. For tax years ending on or after December 31, 2006, the electronic filing requirement applies to exempt organizations with \$10 million or more in total assets if the organization files at least 250 returns in a calendar year, including income, excise, employment tax and information returns. Private foundations and charitable trusts will be required to file Forms 990-PF electronically regardless of their asset size, if they file at least 250 returns annually. For more information, go to [www.irs.gov](http://www.irs.gov). Click "Charities and Non-Profits" and look for the "e-file for Charities and Non-Profits" tab.

For tax forms, instructions and information visit [www.irs.gov](http://www.irs.gov). (Access to this site will not provide you with your specific taxpayer account information.)

**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
TOTAL GAIN (LOSS) .....							----- 21717956. =====	

# Underpayment of Estimated Tax by Corporations

► See separate instructions.  
► Attach to the corporation's tax return.

OMB No 1545-0142

**2007**

Name **THE JOHN MERCK FUND** Employer identification number **23-7082558**

**Note:** Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 34 on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

## Part I Required Annual Payment

1	Total tax (see instructions) . . . . .	1	234,447.
2a	Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1 . . . . .	2a	
2b	Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method . . . . .	2b	
2c	Credit for federal tax paid on fuels (see instructions) . . . . .	2c	
2d	Total. Add lines 2a through 2c . . . . .	2d	
3	Subtract line 2d from line 1. If the result is less than \$500, <b>do not</b> complete or file this form. The corporation does not owe the penalty . . . . .	3	234,447.
4	Enter the tax shown on the corporation's 2006 income tax return (see instructions) <b>Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5</b> . . . . .	4	216,709.
5	Required annual payment. Enter the smaller of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3 . . . . .	5	216,709.

## Part II Reasons for Filing - Check the boxes below that apply. If any boxes are checked, the corporation must file Form 2220 even if it does not owe a penalty (see instructions).

- 6 ☐ The corporation is using the adjusted seasonal installment method.
- 7 ☒ The corporation is using the annualized income installment method.
- 8 ☒ The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

## Part III Figuring the Underpayment

	(a)	(b)	(c)	(d)
9 <b>Installment due dates.</b> Enter in columns (a) through (d) the 15th day of the 4th (Form 990-PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year . . . . .	05/15/2007	06/15/2007	09/17/2007	12/17/2007
10 <b>Required installments.</b> If the box on line 6 and/or line 7 above is checked, enter the amounts from Schedule A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% of line 5 above in each column . . . . .	42,543.	42,543.	56,780.	92,289.
11 <b>Estimated tax paid or credited for each period</b> (see instructions). For column (a) only, enter the amount from line 11 on line 15 . . . . .	148,198.		20,000.	70,000.
<b>Complete lines 12 through 18 of one column before going to the next column.</b>				
12 Enter amount, if any, from line 18 of the preceding column . . . . .		105,655.	63,112.	26,332.
13 Add lines 11 and 12 . . . . .		105,655.	83,112.	96,332.
14 Add amounts on lines 16 and 17 of the preceding column . . . . .				
15 Subtract line 14 from line 13. If zero or less, enter -0- . . . . .	148,198.	105,655.	83,112.	96,332.
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0- . . . . .				
17 <b>Underpayment.</b> If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18 . . . . .				
18 <b>Overpayment.</b> If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column . . . . .	105,655.	63,112.	26,332.	

**Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 - no penalty is owed.**

For Paperwork Reduction Act Notice, see separate instructions.

Form 2220 (2007)



**Part IV Figuring the Penalty**

	(a)	(b)	(c)	(d)
<b>19</b> Enter the date of payment or the 15th day of the 3rd month after the close of the tax year, whichever is earlier (see instructions) ( <i>Form 990-PF and Form 990-T filers:</i> Use 5th month instead of 3rd month) . . . . .	<b>19</b>			
<b>20</b> Number of days from due date of installment on line 9 to the date shown on line 19 . . . . .	<b>20</b>			
<b>21</b> Number of days on line 20 after 4/15/2007 and before 1/1/2008 . . . . .	<b>21</b>			
<b>22</b> Underpayment on line 17 x <u>Number of days on line 21</u> x 8% . . . . . 365	<b>22</b>			
<b>23</b> Number of days on line 20 after 12/31/2007 and before 4/1/2008 . . . . .	<b>23</b>			
<b>24</b> Underpayment on line 17 x <u>Number of days on line 23</u> x 7% . . . . . 366	<b>24</b>			
<b>25</b> Number of days on line 20 after 3/31/2008 and before 7/1/2008 . . . . .	<b>25</b>			
<b>26</b> Underpayment on line 17 x <u>Number of days on line 25</u> x *% . . . . . 366	<b>26</b>			
<b>27</b> Number of days on line 20 after 6/30/2008 and before 10/1/2008 . . . . .	<b>27</b>			
<b>28</b> Underpayment on line 17 x <u>Number of days on line 27</u> x *% . . . . . 366	<b>28</b>			
<b>29</b> Number of days on line 20 after 9/30/2008 and before 1/1/2009 . . . . .	<b>29</b>			
<b>30</b> Underpayment on line 17 x <u>Number of days on line 29</u> x *% . . . . . 366	<b>30</b>			
<b>31</b> Number of days on line 20 after 12/31/2008 and before 2/16/2009 . . . . .	<b>31</b>			
<b>32</b> Underpayment on line 17 x <u>Number of days on line 31</u> x *% . . . . . 365	<b>32</b>			
<b>33</b> Add lines 22, 24, 26, 28, 30, and 32 . . . . .	<b>33</b>			
<b>34</b> <b>Penalty.</b> Add columns (a) through (d) of line 33. Enter the total here and on Form 1120, line 33, or the comparable line for other income tax returns . . . . .				<b>34</b>

**\*For underpayments paid after March 31, 2008:** For lines 26, 28, 30, and 32, use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at [www.irs.gov](http://www.irs.gov). You can also call 1-800-829-4933 to get interest rate information.

Form **2220** (2007)

**Part II Annualized Income Installment Method**

		(a) First <u>2</u> months	(b) First <u>3</u> months	(c) First <u>6</u> months	(d) First <u>9</u> months
<b>20</b> Annualization periods (see instructions).	<b>20</b>				
<b>21</b> Enter taxable income for each annualization period (see instructions for the treatment of extraordinary items)	<b>21</b>	2,836,202.	4,254,303.	9,457,743.	17561650.
<b>22</b> Annualization amounts (see instructions)	<b>22</b>	6.00000	4.00000	2.00000	1.33333
<b>23 a</b> Annualized taxable income Multiply line 21 by line 22	<b>23a</b>	17017212.	17017212.	18915486.	23415475.
<b>b</b> Extraordinary items (see instructions).	<b>23b</b>				
<b>c</b> Add lines 23a and 23b	<b>23c</b>	17017212.	17017212.	18915486.	23415475.
<b>24</b> Figure the tax on the amount on line 23c using the instructions for Form 1120, Schedule J, line 2 (or comparable line of corporation's return)	<b>24</b>	170,172.	170,172.	189,155.	234,155.
<b>25</b> Enter any alternative minimum tax for each payment period (see instructions).	<b>25</b>				
<b>26</b> Enter any other taxes for each payment period (see instructions)	<b>26</b>				
<b>27</b> Total tax Add lines 24 through 26	<b>27</b>	170,172.	170,172.	189,155.	234,155.
<b>28</b> For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c (see instructions)	<b>28</b>				
<b>29</b> Total tax after credits Subtract line 28 from line 27 If zero or less, enter -0-	<b>29</b>	170,172.	170,172.	189,155.	234,155.
<b>30</b> Applicable percentage	<b>30</b>	25%	50%	75%	100%
<b>31</b> Multiply line 29 by line 30	<b>31</b>	42,543.	85,086.	141,866.	234,155.

**Part III Required Installments**

		1st installment	2nd installment	3rd installment	4th installment
<b>Note:</b> Complete lines 32 through 38 of one column before completing the next column.					
<b>32</b> If only Part I or Part II is completed, enter the amount in each column from line 19 or line 31. If both parts are completed, enter the smaller of the amounts in each column from line 19 or line 31	<b>32</b>	42,543.	85,086.	141,866.	234,155.
<b>33</b> Add the amounts in all preceding columns of line 38 (see instructions)	<b>33</b>		42,543.	85,086.	141,866.
<b>34</b> Adjusted seasonal or annualized income installments. Subtract line 33 from line 32. If zero or less, enter -0-	<b>34</b>	42,543.	42,543.	56,780.	92,289.
<b>35</b> Enter 25% of line 5 on page 1 of Form 2220 in each column <b>Note:</b> "Large corporations," see the instructions for line 10 for the amounts to enter	<b>35</b>	54,177.	63,047.	58,612.	58,612.
<b>36</b> Subtract line 38 of the preceding column from line 37 of the preceding column	<b>36</b>		11,634.	32,138.	33,970.
<b>37</b> Add lines 35 and 36.	<b>37</b>	54,177.	74,681.	90,750.	92,582.
<b>38</b> Required installments. Enter the smaller of line 34 or line 37 here and on page 1 of Form 2220, line 10 (see instructions)	<b>38</b>	42,543.	42,543.	56,780.	92,289.

Form 2220 (2007)

## FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INTEREST INCOME --MONEY MARKET FUNDS	638,126.	638,126.
TOTAL	638,126.	638,126.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
STOCKS AND MUTUAL FUNDS	1,452,805.	1,452,805.
TOTAL	1,452,805.	1,452,805.

## FORM 990PF, PART I - OTHER INCOME

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
NET INCOME FROM LIMITED PARTNERSHIPS	2,196,680.	2,196,680.
SECURITIES LITIGATION SETTLEMENTS	26,757.	26,757.
REFUND OF 2005 UNRELATED BUSINESS INCOME TAX	30,000.	
LESS: NET INCOME SUBJECT TO UNRELATED BUSINESS INCOME TAX		-17,549.
	2,253,437.	2,205,888.
TOTALS	=====	=====

FORM 990PF, PART I - LEGAL FEES  
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
GENERAL LEGAL FEES	53,318.	13,340.		39,978.
TOTALS	53,318.	13,340.	NONE	39,978.

## FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES	110,000.	22,500.		87,500.
TOTALS	110,000.	22,500.	NONE	87,500.

## FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
-----	-----	-----	-----
INVESTMENT MANAGEMENT/ADVISORY	753,913.	753,913.	
GRANT PROGRAM CONSULTING FEES	283,228.		283,228.
	-----	-----	-----
TOTALS	1,037,141.	753,913.	283,228.
	=====	=====	=====



## FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
UNRELATED BUSINESS TAX PMTS	39,000.	NONE
FEDERAL EXCISE TAX PMTS	190,000.	NONE
FOREIGN WITHHOLDING TAX	61,864.	61,864.
	-----	-----
TOTALS	290,864.	61,864.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES  
=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
-----	-----	-----	-----
CUSTODIAN FEES	51,957.	51,957.	
INSURANCE	40,991.		40,991.
OFFICE EXPENSE	126,687.		126,687.
PASS-THRU L.P. INVESTMENT EXPENSES	1,590,841.	1,590,841.	
	-----	-----	-----
TOTALS	1,810,476.	1,642,798.	167,678.
	=====	=====	=====

## FORM 990PF, PART II - OTHER NOTES AND LOANS RECEIVABLE

BORROWER: THE VERMONT COMMUNITY LOAN FUND, INC  
 ORIGINAL AMOUNT: 50,000.  
 INTEREST RATE: 0.020000  
 DATE OF NOTE: 12/16/2005  
 MATURITY DATE: 12/16/2008  
 REPAYMENT TERMS: PRINCIPAL & INTEREST DUE AT MATURITY  
 PURPOSE OF LOAN: SEE ATTACHED STATEMENT 9A

BEGINNING BALANCE DUE .....	50,000.
ENDING BALANCE DUE .....	50,000.
ENDING FAIR MARKET VALUE .....	50,000.

BORROWER: AG VENTURE FINANCIAL SERVICES, INC  
 ORIGINAL AMOUNT: 250,000.  
 INTEREST RATE: 0.020000  
 DATE OF NOTE: 07/10/2006  
 MATURITY DATE: 11/01/2016  
 REPAYMENT TERMS: INT ONLY PAYABLE QUARTERLY PRINC DUE AT MATURITY  
 PURPOSE OF LOAN: SEE ATTACHED STATEMENT 9A

BEGINNING BALANCE DUE .....	250,000.
ENDING BALANCE DUE .....	250,000.
ENDING FAIR MARKET VALUE .....	250,000.

TOTAL BEGINNING OTHER NOTES AND LOANS RECEIVABLE	300,000.
TOTAL ENDING BOOK - OTHER NOTES AND LOANS RECEIVABLE	300,000.
TOTAL ENDING FMV - OTHER NOTES AND LOANS RECEIVABLE	300,000.

FORM 990PF, PART II – OTHER NOTES AND LOANS RECEIVABLE

**The Vermont Community Loan Fund, Inc. Loan Receivable:**

The proceeds from the note are to be used to support the mission of the borrower which is tax-exempt under Section 501(c)(3) and classified as a public charity.

**Ag Venture Financial Services, Inc. Loan Receivable:**

The proceeds from the note are to be used by Ag Venture Financial Services, Inc. to loan to Vermont Farmers to aid in the preservation of Vermont working landscapes, support agricultural economic development, create and maintain jobs, and strengthen rural communities.

THE JOHN MERCK FUND  
 FORM 99PF, PART II  
 DECEMBER 31, 2007  
 EIN # 23-7082558

<u>Description</u>	<u>2007</u>	
	<u>Ending Book Value</u>	<u>Ending FMV</u>
<b>Common Stock:</b>		
MainStay	\$ 1,935,063	\$ 1,935,063
Ruane Cunniff & Company Inc	16,152,121	16,152,121
Capital Reserve Account	314,936	314,936
Pinnacle Associates	27,786,167	27,786,167
T Rowe Price	25,770,419	25,770,419
Bernzott Capital Advisors	7,618,056	7,618,056
<b>Total Common Stock</b>	<b>79,576,762</b>	<b>79,576,762</b>
<b>Convertible Preferred Stock:</b>		
Capital Reserve	1,192	1,192
<b>Mutual Funds:</b>		
MainStay International Equity	24,069,633	24,069,633
<b>Total</b>	<b>\$ 103,647,587</b>	<b>\$ 103,647,587</b>

THE JOHN MERCK FUND  
FORM 99PF, PART II  
DECEMBER 31, 2007  
EIN # 23-7082558

<u>Description</u>	<u>2007</u>	
	<u>Ending Book Value</u>	<u>Ending FMV</u>
<b>Investments in Limited Partnerships:</b>		
BCM Grantor Trust	\$ 146,188	\$ 146,188
Fresh Tracks Capital LP	223,403	223,403
Sankaty Credit Oppurtunity I Fund	7,967,859	7,967,859
Sankaty Credit Oppurtunity II Fund	5,152,197	5,152,197
Clarus Lifesciences LP	1,594,332	1,594,332
MPM Bioventures III LP	3,323,066	3,323,066
Sanderson Asset Management	14,825,718	14,825,718
BCP IV Grantor Trust	35,841	35,841
BCP V Grantor Trust	54,035	54,035
Bain Capital VIII LP	4,166,074	4,166,074
Bain SQ VIII LP	83,045	83,045
Bain Capital AIV (Loews) II LP	110,596	110,596
Bain Capital (TRU) VIII LP	467,125	467,125
Brookside Capital Partners Fund LP	31,096,680	31,096,680
Wilshire Associates Private Fund II	4,169,831	4,169,831
Wilshire Associates Private Fund III	5,992,290	5,992,290
Wilshire Associates Private Fund IV	3,871,292	3,871,292
Wilshire Non US Private Fund IV	487,521	487,521
<b>Total</b>	<b>83,767,093</b>	<b>83,767,093</b>
 <b>Other Investments:</b>		
Caymen Investment Company Regiment Capital Ltd.	17,328,327	17,328,327
 Bermuda Investment Company Prism Offshore Fund, Ltd.	6,865,605	6,865,605
 <b>Grand Total</b>	<b>107,961,025</b>	<b>107,961,025</b>

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES  
=====DESCRIPTION  
-----AMOUNT  
-----

NET UNREALIZED LOSS ON INVESTMENTS

4,103,904.

TOTAL

-----  
4,103,904.  
=====

THE JOHN MERCK FUND  
CAPITAL GAIN NET INCOME (FORM 990 PF LINE 7(b))  
DECEMBER 31, 2007  
EIN # 23-7082558

Fund	Proceeds	Costs	Gain/(Loss)	Short-Term	Long-Term	Section 1231 Gain/(Loss)
Publicly Traded Securities:						
Ruane, Cunniff & Co	2,944,505	1,589,109	1,355,396	146,063	1,209,333	
Sands Capital Management	1,292,630	1,288,624	4,006		4,006	
T Rowe Price	33,126,895	27,074,124	6,052,771	1,664,828	4,387,943	
Pinnacle Associates	5,258,211	3,540,020	1,718,191	52,023	1,666,168	
Bernzott Capital Advisors	3,350,516	3,857,850	(507,334)	(507,334)		
	45,972,757	37,349,727	8,623,030	1,355,580	7,267,450	
			2,594,024		2,594,024	
MainStay Int'l Equity Mutual Fund Capital Gain Distribution						
Limited Partnerships Pass-through Gains:						
BCM Grantor Trust			(28,208)		(28,208)	
Boston Ventures LP			7,658		7,658	
Fresh Tracks Capital LP			(22,526)		(22,526)	
Sankaty Credit Opportunity I Fund			545,818		545,818	
Sankaty Credit Opportunity II Fund			146,778		146,778	
MPM Bioventures III LP			375,760		375,760	
Whitney Subordinate Debt LP			5,570		5,570	
Pope Resources Del LTD Partnership			(99,130)		(99,130)	
Sanderson Asset Management			727,236	181,598	545,638	
BCP IV Grantor Trust			181,256		181,256	
BCP V Grantor Trust			72,672		72,672	
Bain Capital VIII LP			252,900		252,900	
Bain Capital AIV (Loews) II LP			58		58	
Brookside Capital Partners Fund LP			6,474,206	1,264,363	5,209,843	
Wilshire Associates Private Fund II			238,724	45,658	193,066	
Wilshire Associates Private Fund III			1,317,009	4,792	1,304,350	7,867
Wilshire Associates Private Fund IV			462,601	5,863	437,522	19,216
Wilshire Non US Private Fund IV			173,413	844	172,569	
			10,831,795	1,503,118	9,301,594	27,083
Totals	45,972,757	37,349,727	22,048,849	2,858,698	19,163,068	27,083
			(330,893)	(65,115)	(269,162)	3,384
Less: Gains subject to UBI Tax			21,717,956	2,793,583	18,893,906	30,467
Total						



**THE JOHN MERCK FUND**  
**2007 EXPENDITURE RESPONSIBILITY GRANTS**

Centro de Estudios de Derecho Justicia y Sociedad  
Carrera 4 #67-30, Apto 601  
Bogota, COLOMBIA

Purpose: To promote human rights and the rule of law in Colombia using research, analysis, advocacy, training and dissemination.

Paid: \$85,000 in 9/2007

Report date: 7/30/2008 (a)

Amount expended: \$85,000

Coordinadora Nacional de Derechos Humanos  
Calle Pezet y Monel 2467  
Lima, PERU

Purpose: To promote and protect human rights in Peru, with an emphasis on monitoring compliance with recommendations made by the Truth and Reconciliation Commission.

Paid: \$50,000 in 12/2007

Report date: None (b)

Amount expended: Not available

Equipo Colombiano de Trabajo Forense y Asistencia Psicosocial  
Calle 127, No. 9B-45  
Bogotá, COLOMBIA

Purpose: To establish the Equipo Colombiano de Trabajo Forense y Asistencia Psicosocial, the Colombian Team for Forensic Work and Psychosocial Assistance.

Paid: \$50,000 in 4/2007

Report date: 4/30/2008 (a)

Amount expended: \$50,000

Memoria Abierta  
Av. Corrientes 2560 2' "E"  
Buenos Aires C1046AAQ  
ARGENTINA

Purpose: To help preserve the memory of Argentina's period of state terrorism and its impact throughout the country, focusing on strengthening the organization's development and communications programs.

Paid: \$40,000 in 2/2007

Report date: None (b)

Amount expended: Not available

Tlachinollan Centro de Derechos Humanos de la Montaña  
Mina #77, Colonia Centro  
Tlapa de Comonfort  
Guerrero CP 41304, MEXICO

Purpose: To defend and promote the human rights of indigenous people in Guerrero, Mexico.  
Paid: \$50,000 in 6/2007  
Report date: 7/31/2008 (a)  
Amount expended: \$50,000

Universidad de Chile Centro de Derechos Humanos  
Santa Maria 076, piso 4  
Providencia, Santiago 664169  
CHILE

Purpose: To strengthen human rights and democracy in Latin America by building the capacity of lawyers, human rights advocates, government officials and journalists.  
Paid: \$90,000 in 9/2007  
Report date: None (b)  
Amount expended: Not available

Washington State Nurses Association  
575 Andover Park West, Suite 101  
Seattle, WA 98188

Purpose: To participate in the Toxic Free Legacy Coalition, which is working to promote policy reforms that protect human health and the environment from the impacts of toxic chemicals.  
Paid: \$27,000 in 12/2007  
Report date: None (b)  
Amount expended: \$27,000

Note: All of the above payments were made during 2007. Reports not due or not yet received from grantees will be reflected on our 2008 Form 990-PF. Future payments to grantees that are delinquent in submitting satisfactory reports will be withheld.

(a) The report received was found to be in order and shows that the funds were fully expended for the purpose of the grant/PRI. To our knowledge, the grantee has not diverted any portion of the funds from the purpose of the grant/PRI.

(b) Final report not yet received but none is expected until after the grant year is completed. Grantees that have failed to submit a report after the end of the fiscal year in which they received the grant will be contacted.

**THE JOHN MERCK FUND**  
**EXPENDITURE RESPONSIBILITY GRANTS PRIOR TO 2007**

Asociación por los Derechos Civiles  
Córdoba 795, 8-16  
Buenos Aires, ARGENTINA

Purpose: To investigate inequalities in access to public education in Buenos Aires, and to develop litigation to reduce those inequalities.

Paid: \$40,000 in 9/2006

Report date: 11/14/2007 (a)

Amount expended: \$40,000

Comisión Mexicana de Defensa y Promoción Derechos Humanos  
Tehuantepec 142, Colonia Roma Sur  
Delegación Cuauhtemoc, CP 11800  
Mexico City, MEXICO

Purpose: To promote human rights and the rule of law in Mexico, through litigating cases of violations before national and international judicial bodies.

Paid: \$70,000 in 12/2006

Report date: 12/20/2007 (a)

Amount expended: \$70,000

Coordinadora Nacional de Derechos Humanos  
Calle Pezet y Monel 2467  
Lima, PERU

Purpose: To promote and protect human rights in Peru, with an emphasis on monitoring compliance with recommendations made by the Truth and Reconciliation Commission.

Paid: \$75,000 in 12/2006

Report date: 7/25/2007 (a)

Amount expended: \$75,000

Equipo Argentino de Antropología Forense  
Rivadavia 2421, 2o piso 1, depto 3-4  
Buenos Aires, Capital Federal 1034, ARGENTINA

Purpose: To conduct forensic human rights investigations and training in Argentina, Colombia, El Salvador and Mexico.

Paid: \$75,000 in 11/2006

Report date: 7/16/2007 (a)

Amount expended: \$75,000

EIN # 23-7082558  
2007 Form 990-PF  
Part VII-B, Line 5c

Equipo Colombiano de Trabajo Forense y Asistencia Psicosocial  
Calle 127, No. 9B-45  
Bogotá, COLOMBIA

Purpose: To establish the Equipo Colombiano de Trabajo Forense y Asistencia Psicosocial, the Colombian Team for Forensic Work and Psychosocial Assistance.

Paid: \$15,000 in 5/2006 & \$50,000 in 6/2006

Report date: 3/14/2007 (a)

Amount expended: \$65,000

Instituto Solidaridad y Desarrollo  
Tacuarembó 1493, apto. 802  
CP 11200, Montevideo, URUGUAY

Purpose: To strengthen the Human Rights Public Policies Oversight System of the Southern Cone Common Market.

Paid: \$40,000 in 12/2006

Report date: None (b)

Amount expended: Not available

Date report requested: 10/2008

Tlachinollan Centro de Derechos Humanos de la Montaña  
Mina #77, Colonia Centro  
Tlapa de Comonfort  
Guerrero CP 41304, MEXICO

Purpose: To provide legal assistance and support to indigenous people in the state of Guerrero, Mexico.

Paid: \$40,000 in 9/2006

Report date: 5/3/2007 (a)

Amount expended: \$40,000

Universidad de Chile Centro de Derechos Humanos  
Santa Maria 076, piso 4  
Providencia, Santiago 664169  
CHILE

Purpose: To strengthen human rights and democracy in Latin America by building the capacity of lawyers, human rights advocates, government officials and journalists.

Paid: \$80,000 in 12/2006

Report date: 1/29/2008 (a)

Amount expended: \$80,000

EIN # 23-7082558  
2007 Form 990-PF  
Part VII-B, Line 5c

Washington State Nurses Association  
575 Andover Park West, Suite 101  
Seattle, WA 98188

Purpose: To strengthen and develop policies for eliminating and cleaning up persistent toxic chemicals in the State of Washington.

Paid: \$29,000 in 12/2006

Report date: 11/8/2007 (a)

Amount expended: \$29,000

Note: All of the above payments were made during 2007. Reports not due or not yet received from grantees will be reflected on our 2008 Form 990-PF. Future payments to grantees that are delinquent in submitting satisfactory reports will be withheld.

(a) The report received was found to be in order and shows that the funds were fully expended for the purpose of the grant/PRI. To our knowledge, the grantee has not diverted any portion of the funds from the purpose of the grant/PRI.

(b) Final report not yet received but none is expected until after the grant year is completed. Grantees that have failed to submit a report after the end of the fiscal year in which they received the grant will be contacted.

## FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
DINAH BUECHNER-BISCHER C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	CO-CHAIR AND TRUSTEE 7.50	12,500.	NONE	NONE
WHITNEY HATCH C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	CO-CHAIR AND TRUSTEE 7.50	25,000.	NONE	NONE
RUTH HENNIG C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	SECRETARY/EXECUTIVE DIRECTOR 36.00	200,000.	43,392.	NONE
HUYLER C. HELD C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TREASURER/TRUSTEE 5.00	25,000.	NONE	NONE
NANCY STOCKFORD C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	ASST SEC/TREASURER / TRUSTEE 36.00	112,000.	38,942.	NONE

## FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
JUDITH M. BUECHNER C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 1.25	NONE	NONE	NONE
FRANCIS W. HATCH C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 5.00	25,000.	NONE	NONE
SERENA M. HATCH C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 1.25	NONE	NONE	NONE
ARNOLD HIATT C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 2.50	25,000.	NONE	NONE
ROBERT M. PENNOYER (TO 9/07) C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 2.50	25,000.	NONE	NONE
FREDERICA PERERA	TRUSTEE 2.50	25,000.	NONE	NONE

## FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109				
DAVID ALTSHULER C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 2.50	25,000.	NONE	NONE
ANNE STETSON C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 5.00	25,000.	NONE	NONE
OLIVIA H. FARR C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 2.50	12,500.	NONE	NONE
KATHERINE ARTHAUD C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	ADVISORY TRUSTEE 1.25	1,000.	NONE	NONE
SERENA H. WHITRIDGE C/O THE JOHN MERCK FUND 2 OLIVER STREET	ADVISORY TRUSTEE 1.25	1,000.	NONE	NONE



FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
BOSTON, MA 02109				
ROBERT H. GARDINER C/O THE JOHN MERCK FUND 2 OLIVER STREET BOSTON, MA 02109	TRUSTEE 1.25	NONE	NONE	NONE
GRAND TOTALS		539,000.	82,334.	NONE

## 990PF, PART VIII - COMPENSATION OF THE FIVE HIGHEST PAID EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
ANNA BAKER C/O THE JOHN MERCK FUND BOSTON, MA 02108	ENVIRONMENT PRGM OFF	60,000.	13,712.	NONE
	TOTAL COMPENSATION	60,000.	13,712.	NONE

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALS  
=====

NAME AND ADDRESS -----	TYPE OF SERVICE -----	COMPENSATION -----
PINNACLE ASSOCIATES LTD 335 MADISON AVE NEW YORK, NY 10017	INVESTMENT MGMT	229,552.
RUANE CUNNIF 767 FIFTH AVENUE NEW YORK, NY 10153	INVESTMENT MGMT	182,185.
FEDERAL STREET ADVISORS, INC. 50 FEDERAL STREET BOSTON, MA 02110	INVESTMENT MGMT	110,000.
EISNER LLP 750 THIRD AVENUE NEW YORK, NY 10017	AUDIT & TAX SERVICES	90,000.
SANDS CAPITAL MANAGEMENT 1100 WILSON BLVD ARLINGTON, VA 22209	INVESTMENT MGMT	80,909.
TOTAL COMPENSATION		----- 692,646. =====

**THE JOHN MERCK FUND**  
**EIN# 23-7082558**  
**December 31, 2007**

**Part XV- Question 3(a):**  
**Grants Paid During 2007**

Abortion Access Project 552 Massachusetts Avenue, Suite 215 Cambridge, MA 02139 Purpose: To increase access to abortion services by developing new abortion providers and developing clinical training sites for primary care physicians.	Public	100,000
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ACCION USA 56 Roland Street, Suite 300 Boston, MA 02129 Purpose: To help ACCION USA applicants improve their credit scores and financial knowledge, thus increasing the number of microentrepreneurs who achieve long-term business success and stability.	Public	35,000
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Advocates for Youth 2000 M Street, NW, Suite 750 Washington, DC 20036 Purpose: (1) To promote comprehensive sexuality education by educating policymakers, supporting science-based programs, and mobilizing parents and youth; and (2) to educate young people, youth-serving professionals and policymakers about the importance of access to emergency contraception for all young people in preventing teen pregnancy.	Public	100,000
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Alaska Community Action on Toxics 505 W. Northern Lights Boulevard, Suite 205 Anchorage, AK 99503 Purpose: To promote regulatory action in Alaska leading toward phaseouts for the most hazardous pesticides.	Public	17,000
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Alternatives for Community & Environment 2181 Washington Street, Suite 301 Roxbury, MA 02119 Purpose: To build a constituency to reduce diesel emissions, provide assistance to local groups to pursue campaigns, and advocate for city and state policies and programs that reduce diesel emissions.	Public	35,000
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**THE JOHN MERCK FUND**

**EIN# 23-7082558**

**December 31, 2007**

American Association on Intellectual and Developmental Disabilities                      Public                      100,000  
444 North Capitol Street, NW, Suite 846  
Washington, DC 20001-1512

Purpose: To raise awareness about the links between toxic chemicals and developmental disabilities, and to seek reduced exposures by collaborating with other environmental and disability organizations to promote progressive public policy.

American Civil Liberties Union Foundation                      Public                      70,000  
125 Broad Street, 18th Floor  
New York, NY 10004-2400

Purpose: To support the Reproductive Freedom Project, which promotes reproductive health and rights in the US using litigation and public education.

Arc of Massachusetts                      Public                      20,000  
217 South Street  
Waltham, MA 02453-2769

Purpose: To achieve fundamental reform in Massachusetts policymaking and regulation on chemical use— stressing prevention of harm to public health and the environment— by building a broad statewide coalition representing health-affected, medical, organized labor, environmental and faith communities.

Asociación Civil por la Igualdad y la Justicia                      Foreign<sup>2</sup>                      50,000  
Avenida de Mayo 1161, 5 piso, #9  
Buenos Aires 1084 AAR  
ARGENTINA

Purpose: To redress the human rights violations faced by Argentina's urban poor.

Asociación por los Derechos Civiles                      Foreign<sup>2</sup>                      50,000  
Cordoba 795, 8-16  
Buenos Aires C1054AAAG  
ARGENTINA

Purpose: To reverse discrimination in constitutionally mandated access to public education in the provinces of Buenos Aires and Tucumán, Argentina.

Asociación pro Derechos Humanos                      Foreign<sup>2</sup>                      90,000  
Jr. Pachacutec 980  
Jesus Maria  
PERU

Purpose: To ensure access to justice and reparation for victims of human rights violations in Peru.

**December 31, 2007**

**Purpose:** (1) To improve access to emergency contraception by educating pharmacists and assisting them in dispensing this method of early birth control; and (2) to forge alliances between the reproductive health and advocacy and environmental health and justice communities that addresses the fundamental links between a healthy environment and healthy families and children.

**Purpose:** To build understanding within the autism community and beyond of the connections between environmental exposures to toxic chemicals and the increasingly prevalent incidence of autism; and to translate that understanding into advocacy for policies that prevent those exposures.

**Purpose:** To provide job training in print technology for low-income individuals in New York City.

**Purpose:** To participate in the Toxic Free Legacy Coalition, which is working to promote policy reforms that protect human health and the environment from the impacts of toxic chemicals while serving as a model for other states and a driver for federal reforms.

New York, NY 10013  
Purpose: To counteract abuses of federal executive privilege during the last six years.

Boston, MA 02115  
Purpose: To support the Hiatt Global Health Residency.

**THE JOHN MERCK FUND**  
**EIN# 23-7082558**  
**December 31, 2007**

Carnegie Mellon University 5000 Forbes Avenue, Baker Hall, 342c Pittsburgh, PA 15213 Purpose: To support research on charting normal and abnormal development of the social brain by John Merck Scholar Kevin Pelphey.	Public	75,000
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Center for Food Safety 660 Pennsylvania Avenue, SE, Suite 302 Washington, DC 20003 Purpose: (1) To work with a media relations firm to raise public awareness of key issues in relation to genetically engineered food; and (2) to prevent any new permit approvals or commercialization of genetically engineered crops; to contain the crops already approved; to toughen federal and state regulations on genetic engineering; and to ensure that food products already on the market are appropriately labeled.	Public	333,000
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Center for Health, Environment & Justice P.O. Box 6806 Falls Church, VA 22040 Purpose: To shift big-box retailers away from PVC plastic in products and packaging, educate consumers about health risks associated with PVC, and support policies that shift the marketplace away from PVC plastics.	Public	50,000
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Center for International Environmental Law 1350 Connecticut Avenue, NW, Suite 1100 Washington, DC 20036 Purpose: To use legal advocacy and policy analysis for the purpose of protecting the global environment and human health, promoting human rights and environmental justice, reforming international trade and finance institutions to support sustainable development, and strengthening public interest capabilities in the Global South.	Public	60,000
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Center for Justice and International Law 1630 Connecticut Avenue, NW, Suite 401 Washington, DC 20009-1053 Purpose: To promote and defend human rights in Latin America using legal mechanisms.	Public	100,000
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**THE JOHN MERCK FUND**

**EIN# 23-7082558**

**December 31, 2007**

Center for Public Interest Research 44 Winter Street, 4th Floor Boston, MA 02108 Purpose: (1) To promote an economy-wide cap on carbon emissions in New England states as a precursor to a national policy; (2) to enable Student PIRG chapters to position young people at the forefront of the movement to stop global warming, and in the process secure significant global warming policies in eleven states and at the federal level; and (3) to enable Environment Massachusetts to achieve fundamental reform in Massachusetts policymaking and regulation on chemical use— stressing prevention of harm to public health and the environment— by building a broad statewide coalition representing health-affected, medical, organized labor, environmental and faith communities.	Public	215,000
Center for the Study of Public Policy 44 Foscett Street Somerville, MA 02144 Purpose: To assist the State Alliance for Federal Reform of Chemicals Policy in strategy and policy development.	Public	12,000
Centro de Estudios de Derecho Justicia y Sociedad Carrera, 4 A #67-30, Apto 601 Bogotá COLOMBIA Purpose: To promote human rights and the rule of law in Colombia using research, analysis, advocacy, training and dissemination.	Foreign <sup>1</sup>	85,000
Centro de Estudios Legales y Sociales Piedras 547, 1st Floor Buenos Aires C1070AAK ARGENTINA Purpose: To promote and protect human rights in Argentina using litigation and advocacy.	Foreign <sup>2</sup>	90,000
CERES 99 Chauncy Street Boston, MA 02111 Purpose: To educate major institutional investors on the financial risks and opportunities related to global warming; and to mobilize investors to pressure companies whose stock they own to take action to mitigate those risks by reducing carbon emissions and supporting climate policies.	Public	65,000
Citizens' Environmental Coalition 119 Washington Avenue, 3rd Floor Albany, NY 12210 Purpose: To promote a "green" procurement policy for New York state agencies and one that requires state agencies to procure products that are free of persistent, bioaccumulative toxic materials.	Public	25,000





## December 31, 2007

**Purpose:** To support the study of the regulation of synaptic development by the neurexin-neuroligin complex by John Merck Scholar Peter Scheiffele, PhD.

**Purpose:** To promote and defend human rights in Colombia using legal mechanisms.

**Purpose:** To increase the number of foster care youth who are working or in school, with programs that could be applied to other at-risk youth in Maine.

**Purpose:** (1) To hold the first national conference that explores potential links between Parkinson's disease and other neurodegenerative diseases and exposures to chemicals in the environment; and (2) to use biomonitoring as a technical tool in support of chemicals policies that better protect human and ecosystem health.

**Purpose:** To enable Massachusetts Climate Action Network to continue developing a network of local community groups that advocate and create models for reducing greenhouse gas emissions at the municipal level.

**Purpose:** To enable MergerWatch to increase access to emergency contraception in targeted states by using strategies that address pharmacy refusals to stock or dispense ECs.

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Community Economic Development Assistance Corporation One Center Plaza, Suite 350 Boston, MA 02108 Purpose: To provide training and professional development opportunities for direct service staff at community-based nonprofit and public agencies in the education, employment, and training sectors.	Public	40,000
Connecticut Citizen Research Group 30 Arbor Street, Suite 6N Hartford, CT 06106-1209 Purpose: To reduce toxic chemicals and win fundamental reform on chemicals policy in Connecticut.	Public	10,000
Connecticut Coalition for Environmental Justice PO Box 2022 Hartford, CT 06145-2022 Purpose: To reduce toxic chemicals and win fundamental reform on chemicals policy in Connecticut.	Public	10,000
ConnectiCOSH Health Technical Committee 683 North Mountain Road Newington, CT 06111 Purpose: To reduce toxic chemicals and win fundamental reform on chemicals policy in Connecticut.	Public	10,000
Connecticut Fund for the Environment 205 Whitney Avenue, 1st Floor New Haven, CT 06511 Purpose: To adopt an economy-wide cap-and-trade system to reduce greenhouse gas emissions in Connecticut.	Public	35,000
Connecticut Nurses Foundation 377 Research Parkway, Suite 2-D Meriden, CT 06450-7160 Purpose: To reduce toxic chemicals and win fundamental reform on chemicals policy in Connecticut.	Public	10,000
Connecticut Public Health Research & Education Fund c/SCSU Department of Health 144 Farnham Avenue New Haven, CT 06511 Purpose: To reduce toxic chemicals and win fundamental reform on chemicals policy in Connecticut.	Public	10,000

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Connecticut Public Interest Research Group Education Fund 198 Park Road, 2nd Floor West Hartford, CT 06119 Purpose: To reduce toxic chemicals and win fundamental reform on chemicals policy in Connecticut.	Public	10,000
Conservation Law Foundation 62 Summer Street Boston, MA 02108 Purpose: To address greenhouse gas emissions from the energy sector in New England by promoting broad regional initiatives to reduce carbon emissions, advancing energy efficiency policies at the state level, and advocating renewable energy policies and projects.	Public	50,000
Consultative Group on Biological Diversity Presidio Building 1016, P.O. Box 29361 San Francisco, CA 94129-0361 Purpose: (1) To provide general support; and (2) to provide operating support for the Health and Environmental Funders Network, which promotes increased and effective grantmaking at the intersection of health and the environment.	Public	15,000
Co-op America Foundation 1612 K Street, NW, Suite 600 Washington, DC 20006 Purpose: To mobilize tens of thousands of individual investors and consumers to pressure major polluters in the oil and gas, utility, and automotive industries, as well as mutual funds and insurance companies, to seriously address climate change by reforming their business and investment practices, stopping support for polluting energy sources, promoting energy efficiency, and investing in renewable energy.	Public	25,000
Coordinadora Nacional de Derechos Humanos Calle Jr. Jose Pezet y Monel 2467 Lince, Lima 14 PERU Purpose: To promote human rights in Peru through litigation, training, documentation and education.	Foreign <sup>1</sup>	50,000
Cornell University Weill Medical College Sackler Institute for Developmental Psychobiology 1300 York Avenue, Box 140 New York, NY 10021 Purpose: To conduct the 2007 summer institute on the biology of developmental disabilities.	Public	75,000

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Demos 220 Fifth Avenue, 5th Floor New York, NY 10001 Purpose: To increase the number of low-income and disenfranchised individuals registered to vote throughout the country by pressing states to fully implement the National Voter Registration Act.	Public	25,000
Due Process of Law Foundation 1779 Massachusetts Avenue, NW, Suite 510A Washington, DC 20036 Purpose: To build capacity within small and remote human rights organizations in Chiapas, Mexico.	Public	45,000
Earthjustice 426 17th Street, 6th Floor Oakland, CA 94612 Purpose: To compel the US Department of Agriculture to comply with federal environmental laws concerning field testing or commercialization of experimental, genetically engineered crops, particularly "biopharm" crops genetically engineered to produce drugs and industrial compounds; and to seek full public disclosure of information regarding crop tests and test sites.	Public	35,000
East Harlem Employment Service/ STRIVE 240 East 123rd Street New York, NY 10035-2038 Purpose: To offer environmental remediation technology training to 60 low-income New York City residents and place them in sustainable-wage jobs.	Public	45,000
ecoAmerica 1924 N Street, NW Washington, DC 20036 Purpose: To build support and leadership among presidents of higher education institutions to address global warming by garnering institutional commitments to reduce greenhouse gases on campuses.	Public	75,000
Ecology Center 117 N. Division Ann Arbor, MI 48104 Purpose: (1) To increase awareness of adverse impacts of toxic chemicals on children's health and the failure of our current system of regulating chemicals; and to build the case for reducing chemical exposures in Michigan through new comprehensive policies and civic engagement; and (2) to influence major automobile manufacturers to use safer, less toxic plastics and other materials by educating consumers and policymakers through media campaigns and other methods about the harmful chemicals typically found inside today's automobiles.	Public	160,000

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Edmund S. Muskie Foundation  
7272 Wisconsin Avenue, Suite 300  
Bethesda, MD 20814

Public	30,000
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**Purpose:** To enable the National Caucus of Environmental Legislators to coordinate and promote campaigns in multiple states to eliminate brominated flame retardants as a precursor to comprehensive chemicals policy reform on persistent, bioaccumulative and toxic chemicals.

Environment Northeast  
PO Box 313, 8 Summer Street  
Rockport, ME 04856-0313

Public	135,000
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**Purpose:** (1) To adopt an economy-wide cap-and-trade system to reduce greenhouse gas emissions in Connecticut; and (2) to promote state energy policy reforms in Connecticut, Massachusetts, and Rhode Island that will allow for dramatic increases in energy efficiency and clean energy resources; and adopt policies requiring diesel pollution controls on construction and non-highway engines, and ensure that funds are appropriated for school and transit bus retrofits.

Environmental Defence Canada  
317 Adelaide Street West, Suite 705  
Toronto, Ontario M5V 1P9  
CANADA

Foreign<sup>2</sup> 23,000

Purpose: To secure a ban on the use of Bisphenol A in food and beverage containers, and baby bottles in particular, as a precursor to a phaseout of all remaining uses in consumer products of this high-priority, hormone-disrupting chemical.

Environmental Defense  
257 Park Avenue South  
New York, NY 10010

Public	30,000
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**Purpose:** To adopt an economy-wide cap-and-trade system to reduce greenhouse gas emissions in Connecticut.

**Environmental Grantmakers Association**  
55 Exchange Place, Suite 405  
New York, NY 10005-1965

Public 8,680

Purpose: (1) To provide general support; and (2) to support the 2008 State of the States Briefing, which will focus on the impact state-level policy change is having on climate change.

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Environmental Health Fund 41 Oakview Terrace Jamaica Plain, MA 02130 Purpose: (1) To coordinate and promote campaigns in multiple states to eliminate brominated flame retardants as a precursor to comprehensive chemicals policy reform on persistent, bioaccumulative and toxic chemicals; and (2) to stimulate national and international efforts to phase out hazardous chemicals from mainstream commerce by serving as strategist, convener, coordinator, implementer and fundraiser in support of key policy and market campaigns.	Public	145,000
Environmental Integrity Project 1919 Eighteenth Street, NW, Suite 650 Washington, DC 20006 Purpose: To reduce greenhouse gas emissions and other pollutants from coal-fired power plants.	Public	85,000
Environmental League of Massachusetts 14 Beacon Street, Suite 714 Boston, MA 02108 Purpose: To achieve fundamental reform in Massachusetts policymaking and regulation on chemical use— stressing prevention of harm to public health and the environment— by building a broad statewide coalition representing health-affected, medical, organized labor, environmental and faith communities.	Public	10,000
Environmental Working Group 1436 U Street, NW, Suite 100 Washington, DC 20009 Purpose: To use body burden testing and other data to promote federal and state chemicals policy reforms and changes in corporate manufacturing practices that are adequate to protect even vulnerable populations from the effects of toxic exposures.	Public	80,000
Equipo Argentino de Antropología Forense Av. Rivadavia 2443, 2 piso 1, depto 3-4 Buenos Aires 1034 ARGENTINA Purpose: To use forensic science techniques to promote human rights in Latin America, and to train scientists to conduct forensic human rights investigations.	Foreign <sup>2</sup>	75,000
Equipo Colombiano de Trabajo Forense y Asistencia Psicosocial Calle 126A, No. 7C-45 Bogotá COLOMBIA Purpose: To investigate human rights violations in Colombia using forensic science techniques and provide psychological services to victims' family members.	Foreign <sup>1</sup>	50,000

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Farm Worker Pesticide Project 5031 University Way NE, Room NB3 Seattle, WA 98105 Purpose: To promote regulatory action in Washington State leading toward phaseouts for the most hazardous pesticides.	Public	17,000
Farmers' Legal Action Group 360 North Robert Street, Suite 500 St. Paul, MN 55101 Purpose: To research, write, produce and widely distribute a new edition of the <i>Farmers' Guide to GMOs</i> .	Public	20,000
Farmworker Association of Florida 815 South Park Avenue Apopka, FL 32703 Purpose: To promote regulatory action in Florida leading toward phaseouts for the most hazardous pesticides.	Public	17,000
Fedcap Rehabilitation Services 211 West 14th Street New York, NY 10011-7157 Purpose: To assist underserved youth in gaining life and job skills to attain long-term living-wage careers.	Public	40,000
Food Works 64 Main Street Montpelier, VT 05602 Purpose: To expand local purchases from area farmers and production at the Foodbank Farm for food distribution to low-income Vermonters.	Public	65,000
George D. Aiken Resource Conservation & Development Council 22 North Main Street, Suite 2 Randolph, VT 05060 Purpose: To enable the Vermont Maple Foundation to educate the public about the special qualities of pure maple syrup through media outreach.	Public	5,460
Global Justice Center 12 East 33rd Street, Suite 1200 New York, NY 10016 Purpose: To provide legal expertise to human rights organizations in Colombia working to insure the Peace and Justice Law complies with international laws requiring gender equity in judicial proceedings and the right to redress for gender crimes.	Public	40,000



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Global Rights 1200 18th Street, NW, Suite 602 Washington, DC 20036	Public	75,000
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Purpose: To combat racial discrimination and promote human rights for African descendants in Latin America.

Guttmacher Institute 125 Maiden Lane, 7th Floor New York, NY 10038	Public	50,000
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Purpose: To give state-level reproductive rights and health advocates and policymakers access to the most current and accurate data, research and analysis to promote the development of reproductive health policy at the state level.

Harvard Medical School Dana Farber Cancer Institute 44 Binney Street, Smith 1022C Boston, MA 02115	Public	75,000
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Purpose: To support research on the functional and molecular analysis of the DSCAM family of neuronal immunoglobulin receptors by John Merck Scholar Dietmar Schmucker, PhD.

Hawaii SEED PO Box 2352 Kealahou, HI 96750	Public	25,000
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Purpose: To stop the release of genetically engineered corn and taro in Hawaii, while cleaning up contamination from the release of genetically engineered papaya.

Health Care Without Harm 1901 North Moore Street, Suite 509 Arlington, VA 22209	Public	50,000
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Purpose: To position the American health care industry as a leader in addressing climate change, both by improving the industry's adoption of energy efficiency and renewable energy use, and by inspiring the industry to advocate for sound climate policies.

Healthy Schools Network 773 Madison Avenue, 1st Floor Albany, NY 12208	Public	60,000
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Purpose: In collaboration with INFORM and Green Seal, to harness and enhance the Coalition for Healthier Schools through collaborative working relationships and increased technical assistance; to use green cleaning as an introductory issue to connect parents, labor, school communities and the public to comprehensive chemical policy reform; and to build additional collaborative networks of nontraditional allies to strengthen environmental health and improve conditions in schools.

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Healthy Teen Network 1501 St. Paul Street, Suite 124 Baltimore, MD 21202 Purpose: To increase access to reproductive health services for adolescents by educating providers about laws relating to minors' access to contraceptives.	Public	50,000
Highfields Institute, Ltd. PO Box 503 Hardwick, VT 05843 Purpose: To promote on-farm composting and soil-building practices, while building a regional and national model for incorporating food waste materials and promoting best practices on farms.	Public	43,000
Human Rights First 333 Seventh Avenue, 13th Floor New York, NY 10001 Purpose: (1) To investigate, describe and provide policy recommendations to remedy the problem of lack of accountability for private military contractors accused of abuse in detention, interrogation and security operations; and (2) to promote human rights around the world, emphasizing US civil liberties, refugee protection, international justice, anti-discrimination and protection of human rights defenders.	Public	220,000
Human Rights Watch 350 Fifth Avenue, 34th Floor New York, NY 10118-3299 Purpose: (1) To assist threatened human rights activists around the world; and (2) to expose and curb human rights violations in Latin America and the United States.	Public	125,000
Independent Sector 1200 Eighteenth Street, NW, Suite 200 Washington, DC 20036 Purpose: To provide an annual contribution for general support.	Public	12,500
Institute for Agriculture and Trade Policy 2105 First Avenue South Minneapolis, MN 55404-2505 Purpose: To create a health-oriented coalition to achieve bans of single chemicals and promote comprehensive chemicals policy reform in Minnesota.	Public	50,000
Institute for Local Self-Reliance 927 15th Street, NW, 4th Floor Washington, DC 20005 Purpose: To accelerate market demand for healthier building materials.	Public	30,000

## December 31, 2007

**Purpose:** To assist countries pursuing accountability for mass atrocity or human rights abuses.

**Purpose:** To strengthen the early implementation of the European Union's REACH program by identifying the chemicals of highest concern that will be subject to the most stringent regulation.

**Purpose:** To enable VoteTrustUSA to provide support services, information resources, collaborative tools and a national voice for election reform groups in states across the country.

**Purpose:** To broaden employment options and increase earning potential for dozens of refugees.

Purpose: (1) To provide the staff capacity to ensure that the Healthy City Youth Farm in the Intervale can successfully fulfill its fresh organic vegetable sales contract with Fletcher Allen Health Care and one additional institutional customer; and to broker larger local fresh food sales contracts from Fletcher Allen in the near future; and (2) to improve the Incubator Farms Program, which will include upgrading the recruitment, training and transitioning programs, and will ensure that Intervale land is managed properly for the long-term sustainability of the program and organization.

**Purpose:** To expand access to safe, high-quality abortion care to women in the US, particularly women who are economically disadvantaged or otherwise marginalized.

**December 31, 2007**

**Purpose:** To enable Coming Clean to work in collaboration with local, state, national and international partners to bring about chemical industry reform so that it is no longer a source of harm to human health and the environment.

Purpose: To frame the debate on energy and global warming as a top-tier priority for national leadership; and to educate candidates for public office about the need for strong and meaningful energy programs that abate climate change.

**Purpose:** To reduce the incidence of learning disabilities in children by raising awareness of environmental factors linked to developmental disabilities, and minimizing or eliminating those exposures.

**Purpose:** To participate in the Alliance for a Clean and Healthy Maine, which protects human health from toxic chemical exposures where we live, work and play by advocating elimination of persistent toxic chemicals and comprehensive chemicals policy reform in Maine.

**Purpose:** To participate in the Alliance for a Clean and Healthy Maine, which protects human health from toxic chemical exposures where we live, work and play by advocating elimination of persistent toxic chemicals and comprehensive chemicals policy reform in Maine.

**Purpose:** To launch an 18-month marketing campaign to embed clean power products within Maine's and New England's retail-level renewable energy markets.

**December 31, 2007**

**Purpose:** (1) To promote regulatory action in Maine leading toward phaseouts for the most hazardous pesticides; and (2) to participate in the Alliance for a Clean and Healthy Maine, which protects human health from toxic chemical exposures where we live, work and play by advocating elimination of persistent toxic chemicals and comprehensive chemicals policy reform in Maine.

Purpose: (1) To implement an organizing campaign that brings together key Maine nonprofit and community leaders to rebuild the power of progressive social change organizations in the state; (2) to assist Maine citizens in holding state and federal regulatory agencies and corporate polluters accountable for their failure to protect the Penobscot River from severe mercury contamination and other pollutants; (3) to participate in the Alliance for a Clean and Healthy Maine, which protects human health from toxic chemical exposures where we live, work and play by advocating elimination of persistent toxic chemicals and comprehensive chemicals policy reform in Maine; and (4) to enable The Maine Civic Engagement Project to build an integrated, permanent progressive infrastructure comprised of research, new tools for common use, issue framing and message discipline, and policy and leadership development programs that are of sufficient scale and ability to influence policy outcomes in Maine.

**Purpose:** To participate in the Alliance for a Clean and Healthy Maine, which protects human health from toxic chemical exposures where we live, work and play by advocating elimination of persistent toxic chemicals and comprehensive chemicals policy reform in Maine.

**Purpose:** To empower cleaning and service workers, many of whom are minorities or recent immigrants, to engage in participatory research and promote company practices and government policies that reduce their exposures to toxic cleaning chemicals and introduce safer alternatives.

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Massachusetts Council of Churches 14 Beacon Street, Suite 416 Boston, MA 02108 Purpose: To conduct outreach about the relationship between health, the environment and racism to the 1,700 congregations affiliated with the Massachusetts Council of Churches member denominations and other interested religious groups; to educate congregation members using the Healthy Churches adult education curriculum; and to engage grassroots church constituencies in policy-related issues, working closely with the Alliance for a Healthy Tomorrow.	Public	30,000
Massachusetts General Hospital Center for Human Genetic Research, CPZN 6234 185 Cambridge Street Boston, MA 02114 Purpose: To support research on neuronal activity-dependent protein synthesis in cognition and cognitive disorders by John Merck Scholar Raymond Kelleher.	Public	15,000
Massachusetts Institute of Technology 43 Vassar Street, 46-4109 Cambridge, MA 02139 Purpose: To support research on the neural basis of theory of mind in typical development and autism by John Merck Scholar Rebecca Saxe.	Public	75,000
Massachusetts Public Health Association 434 Jamaicaaway Jamaica Plain, MA 02130 Purpose: To achieve fundamental reform in Massachusetts policymaking and regulation on chemical use— stressing prevention of harm to public health and the environment— by building a broad statewide coalition representing health-affected, medical, organized labor, environmental and faith communities.	Public	25,000
Medical Students for Choice PO Box 40188 Philadelphia, PA 19106 Purpose: To maintain a network of support and resources for medical students and residents who want to include abortion and family planning in their training; and reform medical curricula and training to include abortion and reproductive health as a standard part of medical education.	Public	35,000
Memoria Abierta Av. Corrientes 2560 2° “E” Buenos Aires C1046AAQ ARGENTINA Purpose: To educate Argentineans about the human rights violations of the last military dictatorship by producing and disseminating material in several media.	Foreign <sup>1</sup>	40,000

**December 31, 2007**

**Purpose:** To support research by John Merck Scholar finalist Song-Hai Shi.

Washington, DC 20005

**Purpose:** To protect the rights of people with mental disabilities in Argentina.

Route 315, Rupert Mountain Road

Rupert, VT 05768

**Purpose:** To give students hands-on exposure to small-scale farming and forestry, past and present.

2314 University Avenue West, Suite 20

St. Paul, MN 55114-1802

**Purpose:** To assist nonprofit organizations in select states in participating in nonpartisan civic engagement.

120 Wall Street, 33rd Floor

New York, NY 10005

**Purpose:** To support state and local groups advocating for comprehensive sexuality education.

156 Main Street

Brockton, MA 02301

**Purpose:** To work with Rhode Island job training, employment placement and social service providers to enable young people in Pawtucket and other Rhode Island cities to enter marine trades.

1660 L Street, NW, Suite 450

Washington, DC 20036

Purpose: To educate and encourage medical students, residents and advanced practice clinicians to provide abortion care in their future practices; and to ensure that access to abortion care is available to underserved women.

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National Association for the Dually Diagnosed 132 Fair Street Kingston, NY 12401-4802 Purpose: (1) To reduce exposure to environmental toxins by increasing awareness about the effects of toxic agents found in the environment and their impact on neurodevelopment; and (2) to provide travel assistance to parents and caregivers to the annual conference; and to provide general support.	Public	45,000
National Family Farm Coalition 110 Maryland Avenue, NE, Suite 307 Washington, DC 20002 Purpose: To support the Farmer-to-Farmer Campaign on Genetic Engineering's efforts to stop the commercialization of genetically engineered rice, and to increase farmer awareness of Monsanto and Syngenta's growing monopoly on farm crop seeds.	Public	40,000
National Family Planning & Reproductive Health Association 1627 K Street, NW, 12th Floor Washington, DC 20006 Purpose: To improve family planning and reproductive health providers' ability to serve as public spokespeople and advocates for those vital services.	Public	50,000
National Institute for Reproductive Health 427 Broadway, 3rd Floor New York, NY 10013 Purpose: To expand the availability of abortion and family planning services in states across the country.	Public	100,000
National Latina Institute for Reproductive Health 50 Broad Street, Suite 1825 New York, NY 10004 Purpose: To further understand the barriers to contraception access that Latina women experience and continue to promote access to emergency contraception among Latinas.	Public	40,000
National Network of Abortion Funds 42 Seaverns Avenue Boston, MA 02130-2865 Purpose: To make small grants to member funds to enable them to increase knowledge of and access to emergency contraception in their states, with an emphasis on reaching women of color and low-income women.	Public	50,000



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National Security Archive Fund  
Gelman Library, Suite 701  
2130 H Street, NW  
Washington, DC 20037  
Public 25,000  
Purpose: To assist Latin American human rights organizations in accessing documents relating to human rights violations using freedom of information mechanisms.

National Women's Law Center  
11 Dupont Circle, NW, Suite 800  
Washington, DC 20036  
Public 100,000  
Purpose: (1) To expand and protect insurance coverage of contraceptives using legal assistance, litigation, research, policy analysis, coalition building and public education; and (2) to ensure that women are not denied access to contraception, particularly by pharmacists and pharmacies refusing to fill prescriptions.

Native American Community Board  
PO Box 572  
Lake Andes, SD 57356-0572  
Public 30,000  
Purpose: To facilitate Native American women's legal access to abortion and pregnancy prevention services.

Natural Resources Council of Maine  
3 Wade Street  
Augusta, ME 04330-6351  
Public 45,000  
Purpose: (1) To secure approval for wind power projects in Maine, and to improve state policies and regulatory processes for wind power; and (2) to participate in the Alliance for a Clean and Healthy Maine, which protects human health from toxic chemical exposures where we live, work and play by advocating elimination of persistent toxic chemicals and comprehensive chemicals policy reform in Maine.

Natural Resources Defense Council  
40 West 20th Street  
New York, NY 10011  
Public 95,000  
Purpose: (1) In collaboration with the Maine People's Resource Center, to compel the HoltraChem Manufacturing Company and Mallinckrodt Inc. to clean up mercury-contaminated sediment in the Penobscot River and Bay caused by a chemical manufacturing facility in Orrington, Maine, which was operated by these companies; and (2) to promote coordinated state, national and international efforts to restrict exports of mercury from the US to developing countries and place surplus mercury into safe storage.

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**December 31, 2007**

New England Working Landscapes for Future Generations PO Box 233 Williamsburg, MA 01096 Purpose: (1) To extend business planning skills to more farms, including those not currently participating in the Vermont Housing & Conservation Board's Farm Viability Enhancement Program; and (2) to assist Vermont's new agriculture commissioner in developing tools to aid the state's dairy industry in efforts to retain valuable farmland.	Public	47,000
New Hampshire Community Loan Fund 7 Wall Street Concord, NH 03301 Purpose: To build a quality workforce for home care by creating jobs that retain experienced and skilled staff and by understanding what homebound elderly value in direct care workers.	Public	40,000
New York City Employment and Training Coalition 11 Park Place, Suite 701 New York, NY 10007 Purpose: To train 200 member organizations in advocacy skills.	Public	35,000
New York Community Trust 909 Third Avenue, 22nd Floor New York, NY 10022 Purpose: To provide general support as recommended by The John Merck Fund.	Public	2,000,000
Northeast Energy Efficiency Partnerships, Inc. 5 Militia Drive Lexington, MA 02421 Purpose: (1) To secure adoption and implementation of energy efficiency appliance standards among states in the Northeast; and to use the momentum and political pressure from state agreements to ensure that similar appliance standards are adopted at the federal level; and (2) to update a report on energy efficiency in the New England electric power sector to reflect new Independent System Operator New England projections, tighter climate change goals, the growing cost of traditional energy sources, and new opportunities for energy efficiency.	Public	65,000
Northeast Organic Farming Association of Vermont PO Box 697 Richmond, VT 05477 Purpose: (1) To improve the Incubator Farms Program, which will include upgrading the recruitment, training and transitioning programs, and will ensure that Intervale land is managed properly for the long-term sustainability of the program and organization; and (2) to enable the Northeast Organic Dairy Producers Alliance to expand information, business and advocacy services to organic dairy producers; and to investigate the market opportunities for farmers in the midst of changing dynamics in the organic dairy industry.	Public	80,000

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Oceana, Inc. 1350 Connecticut Avenue, NW, 5th Floor Washington, DC 20036 Purpose: To substantially reduce mercury releases to the environment by convincing chlorine manufacturers to shift to mercury-free technologies.	Public	75,000
Operation ABLE of Greater Boston 131 Tremont Street Boston, MA 02111 Purpose: To assist unemployed professionals at mid-life in developing the necessary skills and job search strategies to find satisfying work.	Public	40,000
Oregon Toxics Alliance PO Box 1106 Eugene, OR 97440 Purpose: To promote regulatory action in Oregon leading toward phaseouts for the most hazardous pesticides.	Public	17,000
People for Puget Sound 911 Western Avenue, Suite 580 Seattle, WA 98104 Purpose: To participate in the Toxic Free Legacy Coalition, which is working to promote policy reforms that protect human health and the environment from the impacts of toxic chemicals.	Public	30,400
Pesticide Action Network North America 49 Powell Street, Suite 500 San Francisco, CA 94102 Purpose: (1) To coordinate and lead the State Partnerships to Reduce Pesticide Hazards and Promote Policy Change, which will promote regulatory action in six states leading toward phaseouts for the most hazardous pesticides; and (2) to enable Californians for Pesticide Reform to promote regulatory action in California leading toward phaseouts for the most hazardous pesticides.	Public	117,000
Physicians for Human Rights 2 Arrow Street, Suite 301 Cambridge, MA 02138 Purpose: To promote health by protecting human rights around the world.	Public	150,000
Physicians for Reproductive Choice and Health 55 West 39th Street, 10th Floor New York, NY 10019 Purpose: To train health care providers in best practices for addressing the sexual and reproductive health needs of adolescents.	Public	50,000



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**December 31, 2007**

Regulatory Assistance Project Public 75,000

50 State Street, Suite 3

Montpelier, VT 05602

Purpose: To provide policy and technical analysis to state policymakers and stakeholders in implementing the Northeast Regional Greenhouse Gas Initiative.

Reproductive Health Access Project Public 50,000

PO Box 21191

New York, NY 10025

Purpose: To increase the number of family physicians providing early abortion and contraceptive care.

Reproductive Health Technologies Project Public 50,000

1020 19th Street, NW, Suite 875

Washington, DC 20036

Purpose: To expand the traditional reproductive rights framework to include a focus on healthy women and pregnancies; to help pro-choice advocates and organizations become credible advocates for policies that support healthy pregnancies and women; and to facilitate stronger working relationships between the reproductive rights and environmental health communities.

Rose Foundation for Communities and the Environment Public 79,000

6008 College Avenue, Suite 10

Oakland, CA 94618

Purpose: (1) To educate investors, initiate shareholder actions and conduct research to build the business case for speeding substitution of safer chemicals in consumer products; and (2) to enable the Green Purchasing Institute to conduct an assessment of what local governments are doing and can do to advance their environmentally preferable purchasing programs.

Rural Advancement Foundation International-USA Public 50,000

PO Box 640

274 Pittsboro Elementary School Road

Pittsboro, NC 27312

Purpose: To expose the substantial economic and legal risks that genetically engineered crops impose on farmers and rural communities, and demonstrate the benefits of growing conventional crops, particularly when they are organic.

Rural Education Action Project Public 25,000

15 Barre Street, Suite 2

Montpelier, VT 05602

Purpose: To enable Rural Vermont to retain a conflict resolution specialist to facilitate a series of constructive conversations among Vermont farmers who differ in their opinions on genetic engineering issues.

**THE JOHN MERCK FUND**  
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Rutgers University Foundation 41 Gordon Road, Suite A Piscataway, NJ 08854 Purpose: To enable Answer to provide teens with medically accurate, straightforward information about reproductive health produced by their peers, and assist them in supporting comprehensive sexuality education.	Public	75,000
Safe Space NYC 295 Lafayette Street, Suite 920 New York, NY 10012 Purpose: To provide a comprehensive career development program that will address youth unemployment in New York City.	Public	40,000
Science and Environmental Health Network PMB 282, 217 Welch Avenue, Suite 101 Ames, IA 50014 Purpose: To lay the legal foundations for incorporating the precautionary principle in tort law and specific litigation.	Public	70,000
Sexuality Information & Education Council of the US 90 John Street, Suite 704 New York, NY 10038 Purpose: (1) To work with Advocates for Youth to adequately prepare for and counter the messaging and media work of the abstinence-only proponents; and (2) to use education and advocacy to secure and protect the sexual and reproductive health and rights of people in the US.	Public	115,000
SmartPower 100 Pearl Street, 14th Floor Hartford, CT 06103 Purpose: (1) To create a voluntary demand for clean energy from large consumers of electricity in 200 targeted cities and states across the country; (2) to develop marketing strategies to maximize consumer awareness of and demand for energy efficiency; and (3) to create a strong market for clean energy use by developing and implementing state-of-the-art marketing and messaging for clean energy.	Public	100,000
Stanford University 300 Pasteur Drive, Grant Building S-228 Stanford, CA 94305-5208 Purpose: To support research on the impact of placental hormones on brain development in the premature neonate by John Merck Scholar Anna Penn.	Public	75,000

**December 31, 2007**

**Purpose:** To support coordinated efforts in the Great Lakes states to phase out mercury in products and curtail its release into the environment.

Purpose: To place ex-offender training graduates, both from the Roxbury program and the Suffolk House of Corrections, in jobs; and to perfect the training and job placement service for ex-offenders so that it becomes a national model.

**Purpose:** (1) To enable Clean Production Action to coordinate and promote campaigns in multiple states to eliminate brominated flame retardants as a precursor to comprehensive chemicals policy reform on persistent, bioaccumulative and toxic chemicals; (2) to enable EMS/Science Communication Network to broaden and deepen accurate media coverage of environmental health science and policy issues; (3) to enable the Environmental Health Strategy Center to participate in the Alliance for a Clean and Healthy Maine; (4) to enable the Institute for Children's Environmental Health to coordinate the Learning and Developmental Disabilities Initiative; and (5) to enable the Mercury Policy Project to promote coordinated state, national and international efforts to restrict exports of mercury from the US to developing countries and place surplus mercury into safe storage.

**Purpose:** To defend and promote the human rights of indigenous people in Guerrero, Mexico.

Purpose: (1) To reduce pesticide exposures through banning aerial pesticide spraying in Maine and through changing ChemLawn's pesticide practices; and to strengthen the Neighborhood Assistance Project in Rhode Island to work with ten communities to prevent and reduce toxic threats; and (2) to participate in the Alliance for a Clean and Healthy Maine.

**THE JOHN MERCK FUND**  
**EIN# 23-7082558**  
**December 31, 2007**

Trustees of Columbia University 100 Haven Avenue, Tower III, Suite 25F New York, NY 10032	Public	100,000
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Purpose: (1) To enable the Columbia Center for Children's Environmental Health to effectively inform pregnant women, parents, physicians, public interest groups, elected officials and others influencing the policymaking process of the scientific data from the center's biomedical research in an effort to prevent environmentally related disease in children; and (2) to enable the Columbia University Center for the Study of Human Rights to enable Mexican human rights advocates to participate in a skills-building program and related internships.

Union of Concerned Scientists Two Brattle Square Cambridge, MA 02238-9105	Public	120,000
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Purpose: (1) To secure a ban on engineered food crops for use as pharmaceutical and industrial purposes, and identify opportunities to strengthen the overall biotechnology regulatory framework by fostering greater accountability in federal agency reviews of new products; and (2) to transform the US energy system to be economically and environmentally sustainable by expanding the use of renewable electricity.

Universidad de Chile Centro de Derechos Humanos Av. Santa Maria 076, piso 4 Providencia, Santiago 664169 CHILE	Foreign <sup>1</sup>	90,000
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Purpose: To strengthen human rights and democracy in Latin America by providing training and practical skills to nongovernmental, governmental, and inter-governmental professionals who are in a position to influence that process.

Universidad Diego Portales Centro de Derechos Humanos Avenida Manuel Rodriguez 415 Santiago CHILE	Foreign <sup>2</sup>	40,000
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Purpose: To publish, disseminate and publicize the sixth annual report on human rights in Chile.

University of California, Berkeley Berkeley, CA 94720-3190	Public	150,000
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Purpose: (1) To support research on neural underpinnings of deficient cognitive controls in developmental disorders affecting frontostriatal circuitry by John Merck Scholar Silvia Bunge; and (2) to support research on the modulation of taste perception by hunger by John Merck Scholar Kristin Scott.



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**December 31, 2007**

University of California, San Diego 9500 Gilman Drive, #0378, NSB 4322 La Jolla, CA 92093-0378 Purpose: To support research to determine the molecular architecture and functional modulation of glutamate receptor complexes by John Merck Scholar Terunaga Nakagawa.	Public	75,000
University of California, San Francisco 513 Parnassus Avenue, S-762, Box 0444 San Francisco, CA 94143-0744 Purpose: To support research on the neural correlates of learning in the hippocampal-cortical circuit by John Merck Scholar Loren Frank.	Public	75,000
University of California, San Francisco Bixby Center for Reproductive Health Research & Policy 3333 California Street, Suite 335, Box 0744 San Francisco, CA 94143-0744 Purpose: To demonstrate the role and value of advanced practice clinicians in providing early aspiration abortion.	Public	75,000
University of Connecticut Health Center MC6210 Farmington, CT 06030-6210 Purpose: To reduce toxic chemicals and promote fundamental reform on chemicals policy in Connecticut.	Public	5,000
University of Massachusetts Lowell Center for Sustainable Production One University Avenue Lowell, MA 01854 Purpose: (1) To provide concrete recommendations for developing a healthy Massachusetts economy based on cleaner technologies that reduce the use of primary or non-renewable materials and resources and/or toxic substances in products, processes and services; and (2) to influence businesses and policymakers in the United States to adopt sustainable chemicals policies by cooperating with innovative companies in developing new chemicals assessment and policy tools.	Public	140,000
University of Minnesota Medical School 6-145 Jackson Hall, 321 Church Street SE Minneapolis, MN 55455 Purpose: To support research on the role of neuronal excitability in vocal plasticity by John Merck Scholar Teresa Nick.	Public	75,000

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University of Vermont Institute for Artisan Cheese 109 Carrigan Drive, 255 Carrigan Wing Burlington, VT 05405-0044 Purpose: To enhance the quality, safety and production of artisan cheeses by providing educational and technical support to Vermont cheesemakers; and to contract with a media relations firm to increase the visibility and viability of the institute.	Public	100,000
University of Virginia Department of Psychology, PO Box 400400 102 Gilmer Hall Charlottesville, VA 22904-4400 Purpose: To support research by John Merck Scholar finalist Vikram Jaswal.	Public	10,000
Vermont Farms! Association PO Box 828 Montpelier, VT 05601 Purpose: To hire a part time executive administrator, who will build a strong organization capable of promoting agritourism in Vermont and thereby promote sustainable agriculture.	Public	25,000
Vermont Fresh Network PO Box 895 Richmond, VT 05477 Purpose: To build more viable farm businesses through peer-to-peer and professional education on increasing demand for local food, farm production, and distributor partnerships, and through user-friendly, state-of-the-art electronic communications.	Public	33,000
Vermont Housing & Conservation Board 149 State Street Montpelier, VT 05602 Purpose: To coordinate a training conference for Vermont's housing and conservation community.	Public	5,000
Vermont Land Trust 8 Bailey Avenue Montpelier, VT 05602 Purpose: To promote diversified and value-added enterprises on conserved farms, and to assist new farmers in becoming owner-operators of conserved farms.	Public	75,000

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**December 31, 2007**

Vermont Natural Resources Council 9 Bailey Avenue Montpelier, VT 05602 Purpose: To maintain and advance smart growth gains in Vermont by stopping big-box commercial developments outside community centers; to educate the public about the economic, environmental and community impacts of such developments and to work with communities to find viable alternatives to big-box development.	Public	50,000
Vermont Public Interest Research and Education Fund 141 Main Street, Suite 6 Montpelier, VT 05602 Purpose: To reduce the effects of global climate change by promoting expanded use of energy efficiency, encouraging the development of renewable energy resources, and mobilizing support for an enforceable cap on greenhouse gas emissions in Vermont.	Public	50,000
Vermont Works for Women 32 Malletts Bay Avenue Winooski, VT 05404 Purpose: To develop and market technical assistance services to public and nonprofit agencies interested in the Step Up to Law Enforcement program and modular home construction by incarcerated women.	Public	50,000
Vital Communities 104 Railroad Row White River Junction, VT 05001 Purpose: To build a community-driven, local food system that furthers sustainable agriculture by fostering productive relationships between farmers, retail grocers, wholesalers, restaurants, institutions, and local consumers.	Public	35,000
Volunteers of America Northern New England 14 Maine Street, Suite 205 Brunswick, ME 04011 Purpose: To provide women with trade skills so that when they are released from prison they can earn a livable wage; and to build affordable homes for low-income families.	Public	50,000
Washington Office on Latin America 1666 Connecticut Avenue, NW, Suite 400 Washington, DC 20009 Purpose: To promote human rights and democracy in Latin America, with a particular emphasis on improving US policy in the region.	Public	75,000

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Washington Physicians for Social Responsibility 4554 - 12th Avenue NE Seattle, WA 98105	Public	21,000
<p>Purpose: To participate in the Toxic Free Legacy Coalition, which is working to promote policy reforms that protect human health and the environment from the impacts of toxic chemicals.</p>		

Washington Public Interest Research Group Foundation 3240 Eastlake Avenue East, Suite 100 Seattle, WA 98102	Public	15,000
<p>Purpose: To participate in the Toxic Free Legacy Coalition, which is working to promote policy reforms that protect human health and the environment from the impacts of toxic chemicals.</p>		

Washington State Nurses Association 575 Andover Park West, Suite 101 Seattle, WA 98188	Domestic <sup>1</sup>	27,000
<p>Purpose: To participate in the Toxic Free Legacy Coalition, which is working to promote policy reforms that protect human health and the environment from the impacts of toxic chemicals.</p>		

Washington Toxics Coalition 4649 Sunnyside Avenue North, #540 Seattle, WA 98103	Public	198,000
<p>Purpose: (1) To participate in the Toxic Free Legacy Coalition, which is working to promote policy reforms that protect human health and the environment from the impacts of toxic chemicals; and (2) to enable the State Alliance for Federal Reform of Chemicals Policy to launch and win a critical mass of comprehensive policy reform measures in key states to tip the balance for achieving chemicals policy reform at the federal level.</p>		

Waterkeeper Alliance 50 South Buckhout Street, Suite 302 Irvington, NY 10533	Public	50,000
<p>Purpose: To advance precedent-setting litigation under the Canadian Fisheries Act to force Detroit Edison to install emission controls in seven coal-fired power plants.</p>		

Western Organization of Resource Councils Education Project 220 South 27th Street, Suite B Billings, MT 59101	Public	30,000
<p>Purpose: To stop the introduction and further planting of genetically modified crops until potential environmental, economic and health problems can be assessed and remedied.</p>		

**December 31, 2007**

World Resources Institute 10 G Street, NE Washington, DC 20002 Purpose: To help financial service sector companies better understand the greenhouse gas emissions and climate risks that result from their lending and investment practices; and to ultimately help banks better manage their portfolios by encouraging clients to reduce greenhouse gas footprint and climate risks, and transitioning lending and investment portfolios toward cleaner energy technologies.	Public	60,000
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**THE JOHN MERCK FUND**

**EIN# 23-7082558**

**December 31, 2007**

Yale University School of Medicine	Public	10,000
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Yale Child Study Center

40 Tample Street, Sutie 7I

New Haven, CT 06510

Purpose: To support research by John Merck Scholar finalist Katarzyna Chawarska.

YMCA of Greater Boston	Public	40,000
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18 Tremont Street, Suite 400

Boston, MA 02108-2301

Purpose: To successfully prepare Boston Training, Inc. students for careers in medical administration.

Total grants paid	\$14,729,640
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<sup>1</sup> Charitable project grant.

<sup>2</sup> Determined to be a Section 501c3 public charity or educational institution equivalent.

*NONE OF THE RECIPIENTS ARE INDIVIDUALS.*

**THE JOHN MERCK FUND**

**EIN # 23-7082558**

**December 31, 2007**

Part XV – Question 3(b):

Grants Approved for Future Payment

Unless otherwise indicated, the following grants are later installments of the grants described in accompanying list in response to Question 3(a). See that list for foundation status and purpose of grants. If foreign grantees are listed below, the Fund may not yet have made a determination of their foundation status. All grants to these organizations will be made in compliance with the requirements of Section 4945 of the Internal Revenue Code.

<u>NAME</u>	<u>AMOUNT</u>
Carnegie Mellon University 5000 Forbes Avenue Pittsburgh, PA 15213	150,000
Center for Food Safety 660 Pennsylvania Avenue, SE, Suite 302 Washington, DC 20003	30,000
Clean Energy Group 50 State Street, 3rd Floor Montpelier, VT 05602	75,000
Maine People's Resource Center 68 Bishop Street, Suite 1 Portland, ME 04103	150,000
Massachusetts General Hospital Center for Human Genetic Research, CPZN 6234 185 Cambridge Street Boston, MA 02114	285,000
Massachusetts Institute of Technology 43 Vassar Street, 46-4109 Cambridge, MA 02139	225,000
Stanford University School of Medicine 300 Pasteur Drive, Grant Building S-228 Stanford, CA 94305	150,000

**THE JOHN MERCK FUND**

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**December 31, 2007**

Part XV – Question 3(b):

Grants Approved for Future Payment

University of California, Berkeley Berkeley, CA 94720	225,000
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University of California, San Diego 9500 Gilman Drive, #0378, NSB 4322 La Jolla, CA 92093-0378	225,000
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University of Minnesota Medical School 6-145 Jackson Hall, 321 Church Street SE Minneapolis, MN 55455	75,000
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Total grants approved for future payment	\$1,590,000
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*NONE OF THE RECIPIENTS ARE INDIVIDUALS,  
ALL RECIPIENTS ARE PUBLIC CHARITIES.*



## Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
  - If you are filing for an **Additional (not automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

### **Part I** Automatic 3-Month Extension of Time. Only submit original (no copies needed).

Section 501(c) corporations required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only ☐

*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.*

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for section 501(c) corporations required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of Exempt Organization <b>MERCK, THE JOHN FUND</b>	Employer identification number <b>2 3 7 0 8 2 5 5 8</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>47 WINTER STREET, 7TH FLOOR</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>BOSTON MA 02108</b>	

**Check type of return to be filed** (file a separate application for each return):

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

- The books are in the care of ► **MERCK, THE JOHN FUND**

Telephone No. ► ( ) FAX No. ► ( )

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6 months for a section 501(c) corporation required to file Form 990-T) extension of time until Aug 15, 2008, 2008, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year 2007 or
- ☐ tax year beginning / , 20 , and ending / , 20 .

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$ 398198
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$ 238198
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$ 160000

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

OFFICE COPY

- If you are filing for an **Additional (not automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**  
**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.  
 • If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (not automatic) 3-Month Extension of Time.** You must file original and one copy.

Type or print  File by the extended due date for filing the return. See instructions.	Name of Exempt Organization <b>MERCK, THE JOHN FUND</b>	Employer identification number <b>2 3 7 0 8 2 5 5</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>47 WINTER STREET, 7TH FL.</b>	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>BOSTON MA 02108</b>	

Check type of return to be filed (File a separate application for each return):

- |                                      |   |                                      |                                    |
|--------------------------------------|---|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990    | <input checked="" type="checkbox"/> Form 990-PF                   | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 4720   | <input type="checkbox"/> Form 8870 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 5227   |                                    |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of
- MERCK, THE JOHN FUND**

Telephone No. **( )**FAX No. **( )**

- If the organization does not have an office or place of business in the United States, check this box
- ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)
- \_\_\_\_\_**
- . If this is for the whole group, check this box
- ☐
- . If it is for part of the group, check this box
- ☐
- and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until **11/15/08**, 20**08**.
- 5 For calendar year **07**, or other tax year beginning **\_\_\_\_\_**, 20**\_\_\_\_\_**, and ending **\_\_\_\_\_**, 20**\_\_\_\_\_**.
- 6 If this tax year is for less than 12 months, check reason: Initial return Final return Change in accounting period
- 7 State in detail why you need the extension **Awaiting third party information necessary for filing a complete and accurate return**

<b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b>	\$ <b>398,198</b>
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	<b>8b</b>	\$ <b>398,198</b>
<b>c</b> Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b>	\$ <b>0</b>

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **▶**Title **▶**Date **▶****Notice to Applicant. (To Be Completed by the IRS)**

- ☐ We have approved this application. Please attach this form to the organization's return.
- ☐ We have not approved this application. However, we have granted a 10-day grace period from the later of the date shown below or the due date of the organization's return (including any prior extensions). This grace period is considered to be a valid extension of time for elections otherwise required to be made on a timely return. Please attach this form to the organization's return.
- ☐ We have not approved this application. After considering the reasons stated in item 7, we cannot grant your request for an extension of time to file. We are not granting a 10-day grace period.
- ☐ We cannot consider this application because it was filed after the extended due date of the return for which an extension was requested.
- ☐ Other **\_\_\_\_\_**

Director

By

Date

**Alternate Mailing Address.** Enter the address if you want the copy of this application for an additional 3-month extension returned to an address different than the one entered above.

Type or print	Name <b>Eisner LLP, Attn. Steve Pena</b>
	Number and street (include suite, room, or apt. no.) or a P.O. box number <b>750 Third Avenue</b>
	City or town, province or state, and country (including postal or ZIP code) <b>New York, NY 10017-2703</b>

**OFFICE COPY**