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

OMB No 1545-0052

2008

For calendar year 2008, or tax year beginning 03/01 **, 2008, and ending** 02/28 **, 2009**

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 MORTIMER LEVITT FOUNDATION INC. C/O LEVITT PROPERTIES		**A** Employer identification number 13-6204678
	Number and street (or P O box number if mail is not delivered to street address) 100 QUARRY ROAD	Room/suite 2	**B** Telephone number (see page 10 of the instructions) EXT 5 (973) 823-1140
	City or town, state, and ZIP code HAMBURG, NJ 07419		**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 ▶ [ ]

H Check type of organization [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶ $ 38,251,401.

J Accounting method [ ] Cash [X] Accrual
[ ] Other (specify) ________________
(Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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)
Revenue				
1 Contributions, gifts, grants, etc , received (attach schedule)				
2 Check ▶ [ ] if the foundation is **not** required to attach Sch B				
3 Interest on savings and temporary cash investments	220,441.	220,441.		STMT 1
4 Dividends and interest from securities	2,009,641.	2,009,641.		STMT 2
5a Gross rents	1,410,363.	1,410,363.		
b Net rental income or (loss) 765,999.				
6a Net gain or (loss) from sale of assets not on line 10	-4,801,700.			
b Gross sales price for all assets on line 6a 12,606,125.				
7 Capital gain net income (from Part IV, line 2)				
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)	121,070.	121,070.		STMT 11
12 **Total.** Add lines 1 through 11	-1,040,185.	3,761,515.		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	NONE			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule) STMT 12	21,143.	10,572.	NONE	10,571.
b Accounting fees (attach schedule) STMT 13	16,935.	8,468.	NONE	8,467.
c Other professional fees (attach schedule) STMT 14	117,785.	58,893.	NONE	58,892.
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) **	33,340.	33,340.	NONE	NONE
19 Depreciation (attach schedule) and depletion	272,769.	272,769.		
20 Occupancy				
21 Travel, conferences, and meetings	9,437.	4,719.	NONE	4,718.
22 Printing and publications				
23 Other expenses (attach schedule) STMT 16	686,326.	679,025.	NONE	5,928.
24 **Total operating and administrative expenses.** Add lines 13 through 23	1,157,735.	1,067,786.	NONE	88,576.
25 Contributions, gifts, grants paid	2,893,479.			2,893,479.
26 **Total expenses and disbursements** Add lines 24 and 25	4,051,214.	1,067,786.	NONE	2,982,055.
27 Subtract line 26 from line 12				
a **Excess of revenue over expenses and disbursements**	-5,091,399.			
b **Net investment income** (if negative, enter -0-)		2,693,729.		
c **Adjusted net income** (if negative, enter -0-)			-0-	

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Form **990-PF** (2008)

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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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	4,488,399.	65,148.	65,148.
	2 Savings and temporary cash investments			
	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 15 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	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 17	27,757,787.	14,943,755.	8,584,149.
	c Investments - corporate bonds (attach schedule) STMT 18	2,398,101.	2,008,049.	934,497.
	11 Investments - land, buildings, and equipment basis ▶ 12,544,125. Less accumulated depreciation (attach schedule) ▶ 985,521.	6,255,654.	11,558,604.	STMT 19 11,558,604.
	12 Investments - mortgage loans	8,081,911.	7,856,562.	7,573,126.
	13 Investments - other (attach schedule) STMT 20	5,468,504.	14,483,910.	9,408,956.
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ STMT 21)	46,552.	126,921.	126,921.
	16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	54,496,908.	51,042,949.	38,251,401.
Liabilities	17 Accounts payable and accrued expenses	NONE	1,637,440.	
	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 **Total liabilities** (add lines 17 through 22)	NONE	1,637,440.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ [ ] and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ [X]			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	1,062,261.	1,062,261.	
	29 Retained earnings, accumulated income, endowment, or other funds	53,434,647.	48,343,248.	
	30 **Total net assets or fund balances** (see page 17 of the instructions)	54,496,908.	49,405,509.	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	54,496,908.	51,042,949.	

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	54,496,908.
2 Enter amount from Part I, line 27a	2	-5,091,399.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	49,405,509.
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	49,405,509.

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)
1a	SEE PART IV SCHEDULE			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

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

	(i) 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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-4,801,700.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	-1,764,354.

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? [X] 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))
2007			
2006			
2005			
2004			
2003			

2	**Total** of line 1, column (d)	2	
3	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	3	
4	Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	
5	Multiply line 4 by line 3	5	
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	
7	Add lines 5 and 6	7	
8	Enter qualifying distributions from Part XII, line 4	8	

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 ▶ ☐ 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 ▶ ☐ and enter 1% of Part I, line 27b	1	53,875.
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	53,875.
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	53,875.
6	Credits/Payments		
a	2008 estimated tax payments and 2007 overpayment credited to 2008 — 6a: NONE		
b	Exempt foreign organizations-tax withheld at source — 6b: NONE		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: NONE		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	NONE
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ 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	53,875.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2009 estimated tax** ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

		Line	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 ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	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	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	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) ▶ 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 2008 or the taxable year beginning in 2008 (see instructions for Part XIV on page 27)? *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	

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(3)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ KATHY EBERLY Telephone no ▶ 973-823-1140

Located at ▶ 100 QUARRY RD HAMBURG NJ ZIP + 4 ▶ 07419

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF 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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ 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 20 of the instructions)?	1b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2008?	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 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____ , ____ , ____ , ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see page 20 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 ▶ ____ , ____ , ____ , ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☒ Yes ☐ No			
b	If "Yes," did it have excess business holdings in 2008 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 2008.)*	3b		X
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 2008?	4b		X

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** N/A

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** No: 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** No: X

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 22 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 22		NONE	NONE	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

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

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 23		56,954.

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

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 NONE	
3 NONE	
4 NONE	

Part IX-B **Summary of Program-Related Investments** (see page 23 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 ▶	NONE

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes		
a	Average monthly fair market value of securities	1a	33,923,669.
b	Average of monthly cash balances	1b	59,697.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	13,717,968.
d	**Total** (add lines 1a, b, and c)	1d	47,701,334.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	47,701,334.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	715,520.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	46,985,814.
6	**Minimum investment return.** Enter 5% of line 5	6	2,349,291.

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)

1	Minimum investment return from Part X, line 6			1	2,349,291.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	53,875.		
b	Income tax for 2008 (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	53,875.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	2,295,416.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	2,295,416.
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	2,295,416.

Part XII **Qualifying Distributions** (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes		
a	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	2,982,055.
b	Program-related investments - total from Part IX-B	1b	NONE
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	2,982,055.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	N/A
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,982,055.

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 2007	(c) 2007	(d) 2008
1	Distributable amount for 2008 from Part XI, line 7				2,295,416.
2	Undistributed income, if any, as of the end of 2007				
a	Enter amount for 2007 only			2,210,147.	
b	Total for prior years 20____,20____,20____				
3	Excess distributions carryover, if any, to 2008				
a	From 2003				
b	From 2004 NONE				
c	From 2005 NONE				
d	From 2006 NONE				
e	From 2007 NONE				
f	**Total** of lines 3a through e	NONE			
4	Qualifying distributions for 2008 from Part XII, line 4 ▶ $ 2,982,055.				
a	Applied to 2007, but not more than line 2a			2,210,147.	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d	Applied to 2008 distributable amount				771,908.
e	Remaining amount distributed out of corpus	NONE			
5	Excess distributions carryover applied to 2008 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	NONE			NONE
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b	Prior years' undistributed income Subtract line 4b from line 2b				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d	Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e	Undistributed income for 2007 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f	Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				1,523,508.
7	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)				
8	Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	**Excess distributions carryover to 2009.** Subtract lines 7 and 8 from line 6a	NONE			
10	Analysis of line 9				
a	Excess from 2004				
b	Excess from 2005 NONE				
c	Excess from 2006 NONE				
d	Excess from 2007 NONE				
e	Excess from 2008 NONE				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling . . . . ▶

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

	Tax year	Prior 3 years			
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon **a** "Assets" alternative test - enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test- enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see page 27 of the instructions.)

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

SEE STATEMENT 24

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

IN WRITING

c Any submission deadlines

NONE

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

NONE

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SCHEDULE ATTACHED				2,893,479.
Total . . . . ▶ **3a**				2,893,479.
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

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	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	220,441.	
4 Dividends and interest from securities			25	2,009,641.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property			17	765,999.	
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	-4,801,700.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b SEE STATEMENT 10			01	121,070.	
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				-1,684,549.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . . . 13 -1,684,549.

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 28 of the instructions.)
	NOT APPLICABLE

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

				Yes	No
1		Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a		Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1)	Cash	1a(1)		X
	(2)	Other assets	1a(2)		X
b		Other transactions			
	(1)	Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2)	Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3)	Rental of facilities, equipment, or other assets	1b(3)		X
	(4)	Reimbursement arrangements	1b(4)		X
	(5)	Loans or loan guarantees	1b(5)		X
	(6)	Performance of services or membership or fundraising solicitations	1b(6)		X
c		Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	N/A		N/A

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

[signature] 7.14.11 CFO

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature: Carl Weinstein CPA	Date: JUL 13 2011	Check if self-employed ☐	Preparer's identifying number (See **Signature** on page 30 of the instructions): P00374726
Firm's name (or yours if self-employed), address, and ZIP code: CARL WEINSTEIN CPA, P.C. 130 SHORE ROAD, SUITE 101 PORT WASHINGTON, NY 11050			EIN ▶ 20-1976866 Phone no 516-767-1900

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
RENT AND ROYALTY EXPENSES	371,595.			
TELEPHONE	588.	294.	NONE	294.
OFFICE SUPPLIES AND POSTAGE	879.	440.	NONE	439.
REPAIRS	3,133.	1,567.	NONE	1,566.
INVESTMENT ADVISORY FEES	301,499.	301,499.	NONE	NONE
RENT AND ROYALTY EXPENSE		371,595.		
INSURANCE	3,112.	1,556.	NONE	1,556.
ADVERTISING	3,800.	1,900.	NONE	1,900.
	1,373.	NONE	NONE	NONE
BANK FEE	347.	174.	NONE	173.
TOTALS	686,326.	679,025.	NONE	5,928.

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)							-4801700.	

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

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
TAX EXEMPT INTEREST		12,145.	12,145.
INTEREST-UBS		208,296.	208,296.
	TOTAL	220,441.	220,441.

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
GNMA & FHLMC	746,052.	746,052.
STOCK DIVIDENDS	1,263,589.	1,263,589.
TOTAL	2,009,641.	2,009,641.

8E7000 1 000

RENT AND ROYALTY INCOME

Taxpayer's Name	Identifying Number
MORTIMER LEVITT FOUNDATION INC.	13-6204678

DESCRIPTION OF PROPERTY

| | Yes | | No | Did you actively participate in the operation of the activity during the tax year? |

OTHER INCOME

TOTAL GROSS INCOME

OTHER EXPENSES:

DEPRECIATION (SHOWN BELOW)

LESS: Beneficiary's Portion

AMORTIZATION

LESS: Beneficiary's Portion

DEPLETION

LESS: Beneficiary's Portion

TOTAL EXPENSES

TOTAL RENT OR ROYALTY INCOME (LOSS)

Less Amount to

Rent or Royalty

Depreciation

Depletion

Investment Interest Expense

Other Expenses

Net Income (Loss) to Others

Net Rent or Royalty Income (Loss)

Deductible Rental Loss (if Applicable)

SCHEDULE FOR DEPRECIATION CLAIMED

(a) Description of property	(b) Cost or unadjusted basis	(c) Date acquired	(d) ACRS des	(e) Bus %	(f) Basis for depreciation	(g) Depreciation in prior years	(h) Method	(i) Life or rate	(j) Depreciation for this year
Totals									

JSA

8E7000 1 000

RENT AND ROYALTY INCOME

Taxpayer's Name	Identifying Number
MORTIMER LEVITT FOUNDATION INC.	13-6204678

DESCRIPTION OF PROPERTY

ALLTEL

[ ] Yes [ ] No Did you actively participate in the operation of the activity during the tax year?

REAL RENTAL INCOME			
OTHER INCOME			
RENTAL		581,297.	
TOTAL GROSS INCOME			581,297.
OTHER EXPENSES:			
CLEANING		17,861.	
INSURANCE		3,394.	
MANAGEMENT FEES		33,465.	
TAXES		32,395.	
UTILITIES		9,237.	
OTHER EXPENSES		141.	
DEPRECIATION (SHOWN BELOW)	84,436.		
LESS: Beneficiary's Portion			
AMORTIZATION			
LESS: Beneficiary's Portion			
DEPLETION			
LESS: Beneficiary's Portion			
TOTAL EXPENSES			180,929.
TOTAL RENT OR ROYALTY INCOME (LOSS)			400,368.
Less Amount to			
Rent or Royalty			
Depreciation			
Depletion			
Investment Interest Expense			
Other Expenses			
Net Income (Loss) to Others			
Net Rent or Royalty Income (Loss)			400,368.
Deductible Rental Loss (if Applicable)			

SCHEDULE FOR DEPRECIATION CLAIMED

(a) Description of property	(b) Cost or unadjusted basis	(c) Date acquired	(d) ACRS des	(e) Bus %	(f) Basis for depreciation	(g) Depreciation in prior years	(h) Method	(i) Life or rate	(j) Depreciation for this year
SEE STATEMENT									
JSA Totals									84,436.

SUPPLEMENT TO RENT AND ROYALTY SCHEDULE

OTHER INCOME

RENTAL	581,297.
	581,297.

OTHER DEDUCTIONS

OFFICE SUPPLIES AND POSTAGE	141.
	141.

8E7000 1 000

RENT AND ROYALTY INCOME

Taxpayer's Name	Identifying Number
MORTIMER LEVITT FOUNDATION INC.	13-6204678

DESCRIPTION OF PROPERTY

SOCIAL SECURITY BLDG

☐ Yes ☐ No Did you actively participate in the operation of the activity during the tax year?

REAL RENTAL INCOME			
OTHER INCOME			
RENTAL INCOME		359,872.	
TOTAL GROSS INCOME			359,872.
OTHER EXPENSES:			
CLEANING		36,126.	
INSURANCE		1,971.	
LEGAL AND OTHER PROFESSIONAL FEES		78.	
MANAGEMENT FEES		10,751.	
TAXES		59,746.	
UTILITIES		37,841.	
DEPRECIATION (SHOWN BELOW)	67,210.		
LESS: Beneficiary's Portion			
AMORTIZATION			
LESS: Beneficiary's Portion			
DEPLETION			
LESS: Beneficiary's Portion			
TOTAL EXPENSES			213,723.
TOTAL RENT OR ROYALTY INCOME (LOSS)			146,149.
Less Amount to			
Rent or Royalty			
Depreciation			
Depletion			
Investment Interest Expense			
Other Expenses			
Net Income (Loss) to Others			
Net Rent or Royalty Income (Loss)			146,149.
Deductible Rental Loss (if Applicable)			

SCHEDULE FOR DEPRECIATION CLAIMED

(a) Description of property	(b) Cost or unadjusted basis	(c) Date acquired	(d) ACRS des	(e) Bus %	(f) Basis for depreciation	(g) Depreciation in prior years	(h) Method	(i) Life or rate	(j) Depreciation for this year
SEE STATEMENT									
JSA Totals									67,210.

SUPPLEMENT TO RENT AND ROYALTY SCHEDULE

OTHER INCOME

RENTAL INCOME	359,872.
	359,872.

8E7000 1 000

RENT AND ROYALTY INCOME

Taxpayer's Name	Identifying Number
MORTIMER LEVITT FOUNDATION INC.	13-6204678

DESCRIPTION OF PROPERTY

VA HOSPITAL

[ ] Yes [ ] No Did you actively participate in the operation of the activity during the tax year?

REAL RENTAL INCOME			
OTHER INCOME			
RENTAL INCOME		469,194.	
TOTAL GROSS INCOME			469,194.
OTHER EXPENSES:			
CLEANING		64,189.	
INSURANCE		9,126.	
LEGAL AND OTHER PROFESSIONAL FEES		5,036.	
MANAGEMENT FEES		10,700.	
REPAIRS		17,077.	
SUPPLIES		275.	
UTILITIES		20,861.	
OTHER EXPENSES		1,325.	
DEPRECIATION (SHOWN BELOW)	121,123.		
LESS: Beneficiary's Portion			
AMORTIZATION			
LESS: Beneficiary's Portion			
DEPLETION			
LESS: Beneficiary's Portion			
TOTAL EXPENSES			249,712.
TOTAL RENT OR ROYALTY INCOME (LOSS)			219,482.
Less Amount to			
Rent or Royalty			
Depreciation			
Depletion			
Investment Interest Expense			
Other Expenses			
Net Income (Loss) to Others			
Net Rent or Royalty Income (Loss)			219,482.
Deductible Rental Loss (if Applicable)			

SCHEDULE FOR DEPRECIATION CLAIMED

(a) Description of property	(b) Cost or unadjusted basis	(c) Date acquired	(d) ACRS des	(e) Bus %	(f) Basis for depreciation	(g) Depreciation in prior years	(h) Method	(i) Life or rate	(j) Depreciation for this year
SEE STATEMENT									
JSA Totals									121,123.

SUPPLEMENT TO RENT AND ROYALTY SCHEDULE

OTHER INCOME

RENTAL INCOME	469,194.
	469,194.

OTHER DEDUCTIONS

TELEPHONE	1,275.
BANK FEE	50.
	1,325.

RENT AND ROYALTY SUMMARY

PROPERTY	TOTAL INCOME	DEPLETION/ DEPRECIATION	OTHER EXPENSES	ALLOWABLE NET INCOME
ALLTEL	581,297.	84,436.	96,493.	400,368.
SOCIAL SECURITY BLDG	359,872.	67,210.	146,513.	146,149.
VA HOSPITAL	469,194.	121,123.	128,589.	219,482.
TOTALS	1,410,363.	272,769.	371,595.	765,999.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
PARTNERSHIP INCOME		113,605.	113,605.
MISCELLANEOUS INCOME		7,465.	7,465.
	TOTALS	121,070.	121,070.

FORM 990PF, PART I - LEGAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
LEGAL FEES	21,143.	10,572.	NONE	10,571.
TOTALS	21,143.	10,572.	NONE	10,571.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES	16,935.	8,468.	NONE	8,467.
TOTALS	16,935.	8,468.	NONE	8,467.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
OTHER PROFESSIONAL FEES	117,785.	58,893.	NONE	58,892.
TOTALS	117,785.	58,893.	NONE	58,892.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAXES	33,340.	33,340.	NONE	NONE
TOTALS	33,340.	33,340.	NONE	NONE

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
PREFERRED STOCK	3,812,500.	3,042,500.	1,538,104.
NON PACE ASSETS -UBS	3,560,329.	NONE	NONE
PACE ASSETS-UBS	5,085,958.	NONE	NONE
MAP-4800	9,000,000.	8,580,009.	5,028,351.
MAP-4920	1,965,000.	1,762,916.	900,773.
MAP-4921	2,167,000.	865.	865.
MAP-4922	2,167,000.	1,557,465.	1,116,056.
TOTALS	27,757,787.	14,943,755.	8,584,149.

FORM 990PF, PART II - CORPORATE BONDS

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
COUPON CORPORATE BONDS	2,398,101.	2,008,049.	872,003.
ACCRUED INTEREST	NONE	NONE	62,494.
TOTALS	2,398,101.	2,008,049.	934,497.

INVESTMENTS - LAND, BUILDINGS, EQUIPMENT

		FIXED ASSET DETAIL				ACCUMULATED DEPRECIATION DETAIL			
ASSET DESCRIPTION	METHOD/ CLASS	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
BUILDING	SL	3,293,000.			3,293,000.	707,151.	84,436.		791,587.
LAND	L	586,960.			586,960.				
BUILDING	SL	2,621,200.			2,621,200.	5,601.	67,210.		72,811.
LAND	L	467,246.			467,246.				
BUILDING	M39		4,723,800.		4,723,800.		121,123.		121,123.
LAND	L		851,919.		851,919.				
TOTALS		6,968,406.			12544125.	712,752.			985,521.

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
MUTUAL FUNDS	3,202,871.	3,167,725.	2,112,188.
MUTUAL FUNDS-NOT IN PACE	NONE	4,824,687.	2,257,549.
FARMERS BRANCH	-15,710.	NONE	NONE
PENN MANOR	229,032.	262,000.	262,000.
UBS STRUCTURED PRODUCTS	NONE	3,424,283.	2,006,070.
CS BATESVILLE LLC	1,120,580.	1,366,218.	1,366,218.
FIDELITY GOVERNMENT MM	341,731.	341,731.	341,731.
STRUCTURED PRODUCTS	590,000.	1,097,266.	1,063,200.
TOTALS	5,468,504.	14,483,910.	9,408,956.

FORM 990PF, PART II - OTHER ASSETS

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
DUE FROM MANAGING AGENT	44,700.	108,631.	108,631.
DUE FROM TENANT	1,852.	13,199.	13,199.
OTHER RECEIVABLE	NONE	5,091.	5,091.
TOTALS	46,552.	126,921.	126,921.

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
ANNEMARIE LEVITT 10 EAST 82 ND STREET	PRESIDENT	NONE	NONE	NONE
ELIZABETH LEVITT-HIRSCH 9951 KIP DRIVE	VICE PRESIDENT	NONE	NONE	NONE
KATHY EBERLY 100 QUARRY ROAD STE 2 HAMBURG, NJ 07419	TREASURER	NONE	NONE	NONE
MALCOLM CHAIFETZ 488 MADISON AVE STE 1100 NEW YORK, NY 10022	SECY AND GEN COUNSEL	NONE	NONE	NONE
	GRAND TOTALS	NONE	NONE	NONE

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

NAME AND ADDRESS	TYPE OF SERVICE	COMPENSATION
PHILANTHROPIC INITIATIVE 160 FEDERAL ST 10TH FLOOR BOSTON, MA 02110 GRANT MAKER		56,954.
TOTAL COMPENSATION		56,954.

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

MORTIMER LEVITT FOUNDATION INC.
HAMBURG, NJ 07419
973-823-1140

C/O LEVITT PROPERTIES -KATHY EBERLY

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the separate instructions for Form 1041 (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2008

Name of estate or trust: MORTIMER LEVITT FOUNDATION INC.
C/O LEVITT PROPERTIES

Employer identification number: 13-6204678

Note: *Form 5227 filers need to complete **only** Parts I and II*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

	(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a						

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-1,764,355.
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4	Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2007 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	-1,764,355.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

	(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a						

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-3,037,345.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9	Capital gain distributions	9	
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2007 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	-3,037,345.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Part III **Summary of Parts I and II** **Caution:** *Read the instructions **before** completing this part.*		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13 **Net short-term gain or (loss)**	13			-1,764,355.
14 **Net long-term gain or (loss):**				
a Total for year	14a			-3,037,345.
b Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b			
c 28% rate gain	14c			
15 **Total net gain or (loss).** Combine lines 13 and 14a ▶	15			-4,801,700.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and **do not** complete Part IV If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet,** as necessary*

Part IV Capital Loss Limitation

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of
a The loss on line 15, column (3) **or** b $3,000 . . . 16 (3,000.)

Note: *If the loss on line 15, column (3), is more than $3,000, **or** if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover*

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if*

- *Either line 14b, col (2) or line 14c, col (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col. (2) is more than zero

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)		17			
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18				
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19				
20	Add lines 18 and 19	20				
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- ▶	21				
22	Subtract line 21 from line 20 If zero or less, enter -0-		22			
23	Subtract line 22 from line 17 If zero or less, enter -0-		23			
24	Enter the **smaller** of the amount on line 17 or $2,200		24			
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26, go to line 27 and check the "No" box. ☐ **No.** Enter the amount from line 23		25			
26	Subtract line 25 from line 24		26			
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22		27			
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)		28			
29	Subtract line 28 from line 27		29			
30	Multiply line 29 by 15% (.15)				30	
31	Figure the tax on the amount on line 23 Use the 2008 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions)				31	
32	Add lines 30 and 31				32	
33	Figure the tax on the amount on line 17 Use the 2008 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions)				33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on line 1a of Schedule G, Form 1041 (or line 36 of Form 990-T)				34	

Schedule D (Form 1041) 2008

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ See instructions for Schedule D (Form 1041).
▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

OMB No 1545-0092

2008

Name of estate or trust: MORTIMER LEVITT FOUNDATION INC.

Employer identification number: 13-6204678

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a					
UBS- SHORT TERM	03/20/2008	02/15/2009	5,904,556.	7,668,911.	-1,764,355.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . -1,764,355.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041. **Schedule D-1 (Form 1041) 2008**

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Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side	Employer identification number

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a					
UBS - LONG TERM	05/10/2006	02/10/2009	6,701,569.	9,738,914.	-3,037,345.

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b . . . . -3,037,345.

Description of Property

ALLTEL

DEPRECIATION

Asset description	Date placed in service	Unadjusted Cost or basis	Bus %	179 exp reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Method	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
BUILDING	12/01/1995	3,293,000.	100.000			3,293,000.	707,151.	791,587.	SL		39.000				84,436.
LAND	12/01/1995	586,960.	100.000												
Less Retired Assets															
Subtotals		3,879,960.				3,293,000.	707,151.	791,587.							84,436.

Listed Property

Asset description	Date placed in service	Unadjusted Cost or basis	Bus %	179 exp reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Method	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
Less Retired Assets															
Subtotals															
TOTALS		3,879,960.				3,293,000.	707,151.	791,587.							84,436.

AMORTIZATION

Asset description	Date placed in service	Cost or basis	Accumulated amortization	Ending Accumulated amortization	Code	Life	Current-year amortization
TOTALS							

*Assets Retired

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Description of Property

SOCIAL SECURITY BLDG

DEPRECIATION

Asset description	Date placed in service	Unadjusted Cost or basis	Bus %	179 exp reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Method	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
BUILDING	01/20/2008	2,621,200.	100.000			2,621,200.	5,601.	72,811.	SL		39.000				67,210.
LAND	01/20/2008	467,246.	100.000												
Less Retired Assets															
Subtotals		3,088,446.				2,621,200.	5,601.	72,811.							67,210.

Listed Property

Asset description	Date placed in service	Unadjusted Cost or basis	Bus %	179 exp reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Method	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
Less Retired Assets															
Subtotals															
TOTALS		3,088,446.				2,621,200.	5,601.	72,811.							67,210.

AMORTIZATION

Asset description	Date placed in service	Cost or basis	Accumulated amortization	Ending Accumulated amortization	Code	Life	Current-year amortization
TOTALS							

*Assets Retired

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Form **4562** Department of the Treasury Internal Revenue Service (99)

Depreciation and Amortization

(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

2008

Attachment Sequence No **67**

Name(s) shown on return: MORTIMER LEVITT FOUNDATION INC.

Identifying number: 13-6204678

Business or activity to which this form relates: VA HOSPITAL

Part I Election To Expense Certain Property Under Section 179

Note: *If you have any listed property, complete Part V before you complete Part I.*

1	Maximum amount See the instructions for a higher limit for certain businesses	1	
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	
4	Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	

	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
6			

7	Listed property Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2007 Form 4562	10	
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2009 Add lines 9 and 10, less line 12 ▶	13	

Note: *Do not use Part II or Part III below for listed property Instead, use Part V*

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property) (See instructions)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property) (See instructions)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2008	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐		

Section B - Assets Placed in Service During 2008 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property	SEE					
b 5-year property	DETAIL					
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27 5 yrs	M M	S/L	
			27 5 yrs	M M	S/L	
i Nonresidential real property	04/08/2008	4,723,800.	39 yrs	M M	S/L	121,123.
				M M	S/L	

Section C - Assets Placed in Service During 2008 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	M M	S/L	

Part IV Summary (See instructions)

21	Listed property Enter amount from line 28	21	
22	**Total.** Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations - see instr	22	121,123.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V **Listed Property** (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement)

Note: *For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete* ***only*** *24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable*

Section A - Depreciation and Other Information (Caution: *See the instructions for limits for passenger automobiles* **)**

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions)						25		
26 Property used more than 50% in a qualified business use								
		%						
		%						
		%						
27 Property used 50% or less in a qualified business use								
		%				S/L -		
		%				S/L -		
		%				S/L -		
28 Add amounts in column (h), lines 25 through 27 Enter here and on line 21, page 1						28		
29 Add amounts in column (i), line 26 Enter here and on line 7, page 1							29	

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles

	(a) Vehicle 1		(b) Vehicle 2		(c) Vehicle 3		(d) Vehicle 4		(e) Vehicle 5		(f) Vehicle 6	
30 Total business/investment miles driven during the year (**do not** include commuting miles)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year Add lines 30 through 32												
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
34 Was the vehicle available for personal use during off-duty hours?												
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who **are not** more than 5% owners or related persons (see instructions)

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions)		

Note: *If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles*

Part VI **Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2008 tax year (see instructions)					
43 Amortization of costs that began before your 2008 tax year				43	
44 **Total.** Add amounts in column (f) See the instructions for where to report				44	

Description of Property

VA HOSPITAL

DEPRECIATION

Asset description	Date placed in service	Unadjusted Cost or basis	Bus %	179 exp reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Me-thod	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
BUILDING	04/08/2008	4,723,800.	100.000			4,723,800.		121,123.	SL	MM	39.000		39		121,123.
LAND	04/08/2008	851,919.	100.000												
Less Retired Assets															
Subtotals		5,575,719.				4,723,800.		121,123.							121,123.

Listed Property

Asset description	Date placed in service	Unadjusted Cost or basis	Bus %	179 exp reduction in basis	Basis Reduction	Basis for depreciation	Beginning Accumulated depreciation	Ending Accumulated depreciation	Me-thod	Conv	Life	ACRS class	MA CRS class	Current-year 179 expense	Current-year depreciation
Less Retired Assets															
Subtotals															
TOTALS		5,575,719.				4,723,800.		121,123.							121,123.

AMORTIZATION

Asset description	Date placed in service	Cost or basis	Accumulated amortization	Ending Accumulated amortization	Code	Life	Current-year amortization
TOTALS							

*Assets Retired

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Mortimer Levitt Foundation
Annual List of Contribution
March 1, 2008 through February 28, 2009

EIN: 13-6204678
FORM 990-PF
PART XV
LINE 3a

00 Administrative AL

Date	Num	Name	Debit
03/13/2008	031208	Central Park Conservancy	5,000.00
03/13/2008	031208	Cystic Fibrosis Foundation	100 00
03/13/2008	031208	New York City Opera	9,000 00
03/13/2008	031208	Phoenix House	1,000.00
03/13/2008	031208	Hole in the Wall Gang Camp	1,000.00
03/27/2008	032608	International Print Center of New York	250 00
03/27/2008	032608	Trust for Public Land	200.00
03/27/2008	032608	Historic Districts Council	100.00
03/27/2008	032608	New York Preservation Archive Project	100.00
03/27/2008	032608	Museum of the City of New York	250.00
03/27/2008	032608	AARP Foundation	100 00
03/27/2008	032608	Care	75 00
04/03/2008	040208	Preservation League of New York State	100.00
04/03/2008	040208	NRDC	200.00
04/03/2008	040208	Westside Cultural Center for the TIPA	0.00
04/10/2008	040908	Collegiate Chorale	1,000.00
04/10/2008	040908	Mothers Against Drunk Driving	200 00
04/10/2008	040908	Marymount College Writing Center	7,500.00
04/10/2008	040908	New York Pops	0.00
04/17/2008	041608	Colonial Williamsburg Foundation	150.00
04/17/2008	041608	Engineers Without Borders USA	6,000.00
04/23/2008	042208	Annemarie Levitt	90.00
04/23/2008	042208	Joyce Theater Foundation	2,475 00
05/02/2008	043008	Hole in the Wall Gang Camp	500.00
05/02/2008	043008	Collegiate Chorale	1,000.00
05/08/2008	050708	League of Women Voters Education Fund	150 00
05/08/2008	050708	Museum of Arts and Design	2,000.00
05/08/2008	050708	Seeds of Peace	100.00
05/08/2008	050708	Fund for Park Avenue	1,000.00
05/15/2008	051408	Friends of the Upper East Side Historic	9,150 00
05/15/2008	051408	Joyce Theater Foundation	5,000 00
05/15/2008	051408	New York Preservation Archive Project	100 00
05/15/2008	7333	Annemarie Levitt	

8830 Detail

EIN: 13-6204678
FORM 990-PF
PART XV
LINE 3a

Mortimer Levitt Foundation

Annual List of Contribution

March 1, 2008 through February 28, 2009

05/30/2008	052808	New York Foundation for the Arts	10,000.00
05/30/2008	052808	Park Avenue Armory	1,000 00
05/30/2008	052808	Westport Country Playhouse	1,000.00
05/30/2008	052808	Leukemia and Lymphoma Society	100.00
05/30/2008	052808	Care	113 00
05/30/2008	052808	Trees of New York	300 00
06/19/2008	061908	International Rescue Committee	500 00
06/19/2008	061908	Care	100.00
06/19/2008	061908	PCI Media Impact	100.00
06/19/2008	061908	Colonial Williamsburg Foundation	100.00
06/19/2008	061908	United States Holocaust Museum	100.00
06/26/2008	062608	Lincoln Center Theater	2,060.00
07/03/2008	3209	Metropolitan Opera	32,500.00
07/03/2008	3208	New York City Opera	25,000.00
07/17/2008	071708	American Jewish Committee	100.00
07/17/2008	071708	Big Apple Circus	5,000.00
07/17/2008	071708	Camphill Foundation	100.00
07/17/2008	071708	Merchant's House Museum	75 00
07/17/2008	071708	Museum of Arts and Design	10,000.00
07/17/2008	071708	National Osteoporosis Foundation	100.00
07/17/2008	071708	Young Audiences	4,850.00
07/24/2008	072308	American Jewish Committee	0.00
08/13/2008	081308	New York Landmarks Conservancy	1,000 00
08/13/2008	081308	New York Historical Society	1,000 00
08/21/2008	082008	Film Society of Lincoln Center	500.00
08/21/2008	082008	Municipal Art Society	500.00
08/21/2008	082008	Years in the Making	1,500.00
08/28/2008	082808	Landmark West	150 00
08/28/2008	082808	New York Philharmonic	200.00
08/28/2008	082808	PCI Media Impact	1,000 00
09/05/2008	090408	Breast Cancer Research Foundation	5,000 00
09/05/2008	090408	Collegiate Chorale	5,000 00
09/11/2008	090808	Franklin Police Department	0 00
09/18/2008	091708	Citizens Committee for Children	100 00
09/18/2008	091708	Civitas	100 00

8830 Detail

EIN: 13-6204678
FORM 990-PF
PART XV
LINE 3a

Mortimer Levitt Foundation

Annual List of Contribution

March 1, 2008 through February 28, 2009

09/18/2008	091708	Friends of the Upper East Side Historic	750 00
09/18/2008	091708	Museum at Eldridge Street	250.00
09/18/2008	091708	New York City Opera	1,000.00
09/18/2008	091708	NRDC	250.00
09/18/2008	091708	Fund for Park Avenue	1,000.00
09/18/2008	091708	Third Street Music School Settlement	6,500 00
09/18/2008	091708	Young Concert Artists	270.00
09/22/2008		Annemarie Levitt	
09/25/2008	092408	AAF Salzburg Weill Cornell Seminars	500.00
09/25/2008	092408	Connecticut Alliance for Music	1,000.00
09/25/2008	092408	Historic Districts Council	300.00
09/25/2008	092408	Marymount College Writing Center	10,000.00
09/25/2008	092408	New York Cares	100 00
09/25/2008	092408	Oasis Christian Church	4,500.00
09/25/2008	092408	Leukemia and Lymphoma Society	100.00
09/25/2008	092408	Municipal Art Society	1,500.00
09/25/2008	092408	Young Concert Artists	3,000 00
10/02/2008	100108	Metropolitan Museum of Art	10,861.00
10/02/2008	100108	New York Landmarks Conservancy	10,000.00
10/02/2008	100108	New York Pops	150 00
10/16/2008	100908	WNYC Radio	60.00
10/16/2008	100908	Theater for the New City	100.00
10/16/2008	100908	New York Landmarks Conservancy	12,500.00
10/16/2008	100908	Chamber Music Society of Lincoln Center	1,000.00
10/23/2008	102208	Alzheimers Disease Research	100.00
10/23/2008	102208	Bard College	13,750.00
10/23/2008	102208	Camphill Village	200.00
10/23/2008	102208	Andrea Lang Fund SBCAF	100.00
10/30/2008	102908	Big Apple Circus	10,000 00
10/30/2008	102908	Friends of the Westport Center for Senior	16,000.00
10/30/2008	102908	Lighthouse International	100.00
10/30/2008	102908	Phi Beta Kappa Society	135.00
11/13/2008	111208	Cystic Fibrosis Foundation	50 00
11/13/2008	111208	New 42nd Street Theater	2,000 00
11/13/2008	111208	Trust for Public Land	100 00

8830 Detail

Mortimer Levitt Foundation

Annual List of Contribution

March 1, 2008 through February 28, 2009

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PART XV
LINE 3a

11/13/2008	111208	UJA Federation	3,500 00
11/13/2008	111208	Years in the Making	500.00
11/20/2008	111908	Mothers Against Drunk Driving	0 00
11/20/2008	111908	New York City Opera	4,500.00
11/20/2008	111908	Planned Parenthood	200.00
11/20/2008	111908	Westport Country Playhouse	250 00
11/24/2008	112408	Collegiate Chorale	3,450.00
11/24/2008		Young Concert Artists	
12/04/2008	120308	AASR	2,000.00
12/04/2008	120308	American Symphony Orchestra	1,000.00
12/04/2008	120308	City Harvest	100 00
12/04/2008	120308	Family Intervention Services	2,000.00
12/04/2008	120308	Harvest House	2,000.00
12/04/2008	120308	Historic House Trust of New York City	250.00
12/04/2008	120308	Marymount College Writing Center	5,000.00
12/04/2008	120308	Memorial Sloan Kettering Cancer Center	60.00
12/04/2008	120308	New York City Opera	25,000.00
12/04/2008	120308	NRDC	100 00
12/04/2008	120308	Project Self Sufficiency	2,000.00
12/04/2008	120308	Samaritan Inn	1,000.00
12/04/2008	120308	SCARC	1,000 00
12/04/2008	120308	Seeds of Peace	100 00
12/04/2008	120308	Westport Public Library	250.00
12/23/2008	122208	92nd Street Y	150.00
12/23/2008	122208	American Health Assistance Foundation	150 00
12/23/2008	122208	Chess in the Schools	100.00
12/23/2008	122208	World Wildlife Fund	150 00
12/30/2008	123008	Earthplace	100.00
12/30/2008	123008	Phoenix House	20,000.00
01/15/2009	011309	Civitas	150.00
01/15/2009	011309	Leukemia and Lymphoma Society	100 00
01/15/2009	011309	Lyric Chamber Music Society	150.00
01/15/2009	011309	Museum of Modern Art	1,000.00
01/15/2009	011309	Music for Youth Inc	3,000 00
01/15/2009	011309	United Way	500 00

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	01/29/2009	012809	Department of Neurology and Neuroscience	500 00
	01/29/2009	012809	Friends of the Upper East Side Historic	3,000 00
	01/29/2009	012809	Marymount College Writing Center	10,000 00
	01/29/2009	012809	NRDC	150 00
	01/29/2009	012809	Breast Cancer Research Foundation	5,300 00
	01/29/2009	012809	Town School	1,000 00
	01/29/2009	012809	US Fund for Unicef	150 00
	02/04/2009	020209	Emmanuel Cancer Foundation	750.00
	02/05/2009	020309	Lawrence Music Department	10,000.00
	02/05/2009	020409	Lincoln Center Theater	500 00
	02/05/2009	020409	Theater for the New City	400.00
	02/05/2009	020409	Writers and Books	1,000.00
	02/05/2009	020409	Young Concert Artists	1,700.00
	02/09/2009		A Levitt - Non Deductible	
	02/19/2009	021809	American Associates Ben Gurion University	250.00
	02/19/2009	021809	Defenders of Wildlife	100.00
	02/19/2009	021809	Doctors Without Borders	250.00
	02/19/2009	021809	League of Women Voters Education Fund	150 00
	02/24/2009	022409	YMCA Strong Kids Campaign	2,500 00
	02/25/2009	022409	Bard College	15,000.00
	02/25/2009	022409	Central Park Conservancy	5,000.00
	02/25/2009	022409	Thresholds	100.00
	02/25/2009	022509	Young Concert Artists	500.00
Total 00 Administrative AL				409,474.00
001 Administrative ELH				
Brand Development				
	06/30/2008	062708	KPCC	500.00
	07/31/2008	073008	KCRW Foundation	25,400.00
	08/29/2008	082808	KPCC	20,000 00
Total Brand Development				45,900.00
001 Administrative ELH - Other				
	03/13/2008	030708	Adopt A Classroom	250 00
	03/13/2008	031208	Westside Children's Center	1,000.00

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03/13/2008	031208	World Wildlife Fund	1,000 00
03/20/2008	031408	American Ballet Theatre	1,000 00
03/20/2008	031908	Ballroom Madness	2,500.00
03/20/2008	032008	EIF Revlon Run / Walk Los Angeles	250 00
03/20/2008	031908	Los Angeles Chamber Orchestra	300.00
03/20/2008	032008	Otis Fund for Scholarships	1,000.00
03/27/2008	032408	Ballet Florida	500.00
03/27/2008	032408	Ballet Hispanico	250.00
03/27/2008	032408	Children of the Night	300.00
03/27/2008	032508	New West Symphony	500 00
03/27/2008	032608	California Presenters	1,500.00
03/28/2008	032608	Dance Camera West	15,000.00
03/28/2008	032608	Colleagues	125 00
03/28/2008	032608	USC Center on Philanthropy and Public	60 00
04/03/2008	032808	Pasadena Arts Council	500 00
04/03/2008	032808	CalArts	2,500.00
04/03/2008	040208	Human Rights Watch	500.00
04/03/2008	040208	Humane Farming Association	250.00
04/03/2008	040208	LA Contemporary Dance	500 00
04/03/2008	040208	Los Angeles Philharmonic Association	2,550.00
04/03/2008	033108	Step Up 4 Vets	1,000.00
04/03/2008	040208	YWCA Santa Monica	500.00
04/08/2008	040708	Spirit Of Youth Foundation	350.00
04/10/2008	040308	Beyond Shelter	1,500.00
04/10/2008	040208	CHP 11-99 Foundation	10,000 00
04/17/2008	041708	Anti Defamation League	1,000 00
04/17/2008	041708	California State Parks Foundation	300 00
04/24/2008	042108	Music Center	2,250.00
05/02/2008	042908	AmeriCares	250 00
05/02/2008	042908	Music Center	2,000.00
05/02/2008	042908	Otis College of Art and Design	1,000.00
05/08/2008	050608	Dance Camera West	5,000 00
05/08/2008	050708	Grace St Lukes Church	250.00
05/22/2008	052108	Children of the Night	250 00
05/22/2008	052108	Friends of the Family	500 00

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05/22/2008	052008	HOLA	500 00
05/22/2008	052008	Los Angeles United Methodist Urban	500 00
05/22/2008	052008	Madison Project Foundation	15,000.00
05/22/2008	051908	Gabriella Axelrad Education Foundation	5,000 00
05/23/2008	052208	Armory Center for the Arts	200.00
05/23/2008	052208	ASPCA	100.00
05/23/2008	052208	Legal Momentum Advancing Womens Rights	100.00
05/23/2008	052208	Pasadena Arts Council	500 00
05/23/2008	052208	Tree People	1,000.00
06/04/2008	060308	Pasadena Arts Council	33,300.00
06/04/2008	3178	Void	
06/06/2008		Creative Visions Foundation	2,500 00
06/10/2008	061008	Pasadena Arts Council	20,000.00
06/12/2008	060908	Institute for Urban Research and	15,000.00
06/12/2008	060908	Korean Performing Arts Association	4,000.00
06/19/2008	061608	Los Angeles Master Chorale	0 00
06/19/2008	061608	Ballroom Madness	5,000.00
06/19/2008	061608	JBBBS/Camp Max Straus	500.00
06/19/2008	061608	Dance Camera West	5,000.00
06/26/2008	062508	Children of the Night	250 00
06/26/2008	062508	HFAF	100.00
06/26/2008	062508	PATH Partners	250.00
06/26/2008	062608	Museum of Modern Art	1,000 00
07/02/2008	070208	Beyond Shelter	500.00
07/02/2008	070208	Los Angeles Chamber Orchestra	200.00
07/02/2008	070108	Pasadena Arts Council	25,000.00
07/02/2008	070208	Pasadena Humane Society and SPCA	500.00
07/02/2008	070208	Pasadena Senior Center	500.00
07/10/2008	070908	Korean Performing Arts Association	4,000.00
07/17/2008	071608	New Ballet Ensemble School	1,000.00
07/18/2008	071708	APEX	4,500.00
07/25/2008	072508	HOLA	500.00
07/25/2008	072508	Leukemia and Lymphoma Society	250 00
07/31/2008	072508	Mammoth Lakes Foundation	250 00
08/07/2008	073108	Crown City Theater Company	1,000 00

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08/12/2008	081208	San Diego Foundation	4,500 00
08/12/2008	081208	Hollywood Arts	3,375.00
08/13/2008	081308	Orchestras of Pasadena	100 00
08/14/2008	081408	People for the American Way	0.00
08/14/2008	081208	UNA -Pasadena Foothills Chapter, Inc	250.00
08/28/2008	082508	Center for the Arts, Eagle Rock	500.00
08/28/2008	082708	Hollywood Arts	15,000.00
08/28/2008	082508	Pawd Squad	250.00
08/29/2008	082808	St Barnabas Senior Center	750.00
09/05/2008	090208	Fred Jordan Mission	500.00
09/05/2008	090208	Eco-Partners	250.00
09/11/2008	091008	Los Angeles Master Chorale	5,500.00
09/12/2008	091108	ALS Association	200.00
09/12/2008	091108	Our House	5,000.00
09/18/2008	091208	Grantmakers in the Arts	500.00
09/18/2008	091608	Liberty Hill Foundation	500.00
09/18/2008	091608	Ryman Arts	250.00
09/18/2008	091608	Music Center	150.00
09/18/2008	091508	Rape Foundation	350.00
09/18/2008	091608	Tower Cancer Research Foundation	150.00
09/18/2008	091508	Western Center on Law and Poverty	300.00
09/18/2008	091208	WMMC Chairtable Foundation	1,000.00
09/22/2008	091808	ASPCA	100.00
09/22/2008	091808	Los Angeles Conservancy Preservation	1,000 00
09/22/2008	091808	USC University Hospital Guild	200.00
09/25/2008	092308	Ballet Hispanico	250.00
09/25/2008	092308	Joffery Ballet	1,000.00
09/25/2008	092308	Rape Foundation	350.00
09/25/2008	092308	Scripps College	2,000.00
09/25/2008	092408	Southern California Grantmakers	7,000.00
09/25/2008	092408	Blue Ribbon	150 00
10/02/2008	092908	French Heritage Society	150.00
10/02/2008	092908	Human Rights Watch	1,000.00
10/02/2008	092908	Pasadena Playhouse	350 00
10/02/2008	093008	Saban Free Clinic	1,000.00

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10/16/2008	100808	Tree People	200.00
10/16/2008	100808	Pacific Asia Museum	200.00
10/16/2008	100908	Los Angeles Regional Food Bank	200 00
10/16/2008	100908	Southern California Grantmakers	50 00
10/16/2008	100908	San Diego Foundation	3,500.00
10/16/2008	101008	Sullivan Media Group	11,000 00
10/16/2008	101008	Porrath Foundation	500.00
10/16/2008	101008	Center on Philanthropy and Public	85.00
10/16/2008	101408	Mammoth Lakes Foundation	250.00
10/16/2008	101408	HOLA	5,000.00
10/16/2008	101508	City of Hope	1,000.00
10/23/2008	101608	Career Transition for Dancers	250.00
10/30/2008	102908	ASPCA	100.00
10/30/2008	102708	Los Angeles Conservancy Preservation	5,000.00
10/30/2008	102908	Planned Parenthood	200.00
10/30/2008	102708	United Nations Association	100.00
11/06/2008	103108	Southern California Grantmakers	0.00
11/06/2008	110508	American India Foundation	1,000 00
11/06/2008	110608	Korean Resource Center	1,500 00
11/13/2008	103108	Children of the Night	150.00
11/13/2008	110608	Korean Resource Center	0.00
11/13/2008	103108	Humane Farming Association	100.00
11/13/2008	111008	Music Center	20,000.00
11/13/2008	111008	Childrens Bureau The Angelic Auxiliary	100.00
11/13/2008	111008	PATH Partners	100.00
11/20/2008	111008	Childrens Burn Foundation	550 00
11/20/2008	111308	HOLA	600.00
11/20/2008	111408	Salvation Army	150 00
11/20/2008	111908	Joffery Ballet Scholarship Fund	250.00
11/20/2008	111908	Legal Momentum Advancing Womens Rights	250 00
11/20/2008	111908	Pasadena Arts Council	100 00
11/20/2008	111908	Orchestras of Pasadena	150 00
11/26/2008	112408	Academy of Puppetry and Allied Arts	1,000 00
11/26/2008	112408	Dance Camera West	3,000 00
12/04/2008	112608	Armory Center for the Arts	500 00

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12/04/2008	120208	Beyond Shelter	200.00
12/04/2008	120208	Break the Cycle	150 00
12/04/2008	120208	CalArts	250.00
12/04/2008	120308	Hollywood Arts	25,000.00
12/04/2008	120208	Los Angeles Mission	100.00
12/04/2008	120308	Mothers Club Family Learning Center	100.00
12/04/2008	120208	New Ballet Ensemble School	1,000.00
12/04/2008	120208	Gabriella Axelrad Education Foundation	1,000.00
12/04/2008	120308	Womens Foundation of Califorinia	250 00
12/04/2008	120208	Western Center on Law and Poverty	250.00
12/04/2008	112608	Womens Guild	200.00
12/11/2008	120908	Global Fund for Women	100.00
12/11/2008	120908	Pasadena Humane Society and SPCA	100.00
12/11/2008	120908	Share Inc	100.00
12/11/2008	120408	City Hearts	100.00
12/11/2008	121008	Pasadena Arts Council	1,000.00
12/11/2008	120908	Union of Concerned Scientists	100.00
12/16/2008		Center for the Arts, Eagle Rock	0.00
12/18/2008	121208	Center on Science in the Public Interest	200.00
12/18/2008	121208	Joffery Ballet	100.00
12/18/2008	121208	Los Angeles Times Holiday Campaign	100.00
12/18/2008	121208	Lung Cancer Foundation of America	250 00
12/23/2008	121908	Collage Dance Theater	200 00
12/23/2008	121908	Los Angeles Housing Partnership	750 00
12/23/2008	121908	San Diego Foundation	15,000.00
12/29/2008	122408	Doctors Without Borders	100.00
12/29/2008	122408	E Monte Motion	100 00
12/29/2008	122408	Empower Tech	200.00
12/29/2008	122408	Imagine LA	100.00
12/29/2008	122408	Los Angeles Ballet	200.00
12/29/2008	122408	Los Angeles Chamber Orchestra	150.00
12/29/2008	122408	Los Angeles Conservancy Preservation	250 00
01/08/2009	010709	ASPCA	100.00
01/08/2009	010709	Theatrical Diversity Project Celebration	1,000 00
01/15/2009	011309	Crown City Theater Company	150.00

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01/15/2009	011209	Imagine LA	250.00
01/15/2009	011409	US Olympic Committee	50.00
01/22/2009	011509	Art 4 Life	250 00
01/22/2009	012109	Library Foundation of Los Angeles	250.00
01/22/2009	011909	One Revolution Foundation	500.00
01/22/2009	011509	Paloma Blanca Creative Enterprises	0 00
01/22/2009	012109	Pasadena Senior Center	100.00
01/22/2009	012109	Veterans Park Conservancy	250 00
01/22/2009	012109	Weingart Center Association	250.00
01/22/2009	011509	World Wildlife Fund	1,000.00
01/22/2009	012109	YWCA Santa Monica	100.00
01/29/2009	012609	Amanda Foundation	0.00
01/29/2009	012709	Hollywood Arts	10,000.00
01/29/2009	012709	Bark Avenue Foundation	200.00
02/04/2009	012909	City Dance Ensemble	1,000.00
02/04/2009	013009	Dave McCoy College Classic	100.00
02/04/2009	013009	Humane Farming Association	100.00
02/05/2009	020309	Media Matters for America	100.00
02/05/2009	020309	Dream Street Foundation	100.00
02/12/2009	020509	ASPCA	100.00
02/12/2009	020909	Career Transition for Dancers	100 00
02/12/2009	020909	Lake Forest College	75.00
02/12/2009	020909	Southern California Public Radio	25,000.00
02/12/2009	020509	Music Center	1,000.00
02/12/2009	020909	World Music Productions	100.00
02/19/2009	021809	California Dance Institute	15,000.00
02/19/2009	021809	Grand Performances	1,000.00
02/19/2009	021809	Light Bringer Project	100.00
02/28/2009	030209	Beyond Shelter	2,500 00
02/28/2009	030209	Colleagues	200.00
02/28/2009	030209	Liberty Hill Foundation	3,000 00
02/28/2009	030209	Los Angeles United Methodist Urban	200.00
02/28/2009	030209	Music Center	10,000.00
02/28/2009	030209	National Partnership for Women and	100.00
02/28/2009	030209	Planned Parenthood Los Angeles Guild	120 00

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	02/28/2009	030209	USC Center on Philanthropy and Public	85 00
Total 001 Administrative ELH - Other				439,775.00
Total 001 Administrative ELH				485,675.00
002 Pavilions				
001 Westport				
	06/19/2008	061908	Friends of the Levitt Pavilion Westport	10,000.00
	07/24/2008	072308	Friends of the Levitt Pavilion Westport	7,500.00
	12/04/2008	120308	Friends of the Levitt Pavilion Westport	500.00
	02/24/2009	022409	Friends of the Levitt Pavilion Westport	1,000,000.00
	02/25/2009	022409-2	Friends of the Levitt Pavilion Westport	500.00
Total 001 Westport				1,018,500.00
002 Pasadena				
	03/14/2008	031308	Friends of the Levitt Pavilion Pasadena	850.00
	04/11/2008	040908	Friends of the Levitt Pavilion Pasadena	500.00
	04/11/2008	040908-2	Friends of the Levitt Pavilion Pasadena	28,459.00
	05/30/2008	052908	Friends of the Levitt Pavilion Pasadena	100,000 00
	08/08/2008	080808	Friends of the Levitt Pavilion Pasadena	5,040 00
	08/08/2008	080808-1	Friends of the Levitt Pavilion Pasadena	0 00
	08/13/2008	081308	Friends of the Levitt Pavilion Pasadena	15,750 00
	08/13/2008	081308-1	Friends of the Levitt Pavilion Pasadena	681 00
	08/22/2008	082108	Friends of the Levitt Pavilion Pasadena	150.00
	10/02/2008	092508	Friends of the Levitt Pavilion Pasadena	5,300 00
	10/02/2008	092508-2	Friends of the Levitt Pavilion Pasadena	4,000.00
	01/29/2009	122308	Friends of the Levitt Pavilion Pasadena	50,000.00
	02/19/2009	021809	Friends of the Levitt Pavilion Pasadena	1,750.00
Total 002 Pasadena				212,480 00
003 MacArthur Park				
	04/24/2008	041708	Friends of the Levitt Pavilion MacArthur	19,000 00
	06/12/2008	060908	Friends of the Levitt Pavilion MacArthur	96,950.00
	07/10/2008	070308	Friends of the Levitt Pavilion MacArthur	7,900.00
	07/25/2008	072508	Friends of the Levitt Pavilion MacArthur	134,000 00

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	07/31/2008	072508	Friends of the Levitt Pavilion MacArthur	4,200 00
	08/21/2008	082008	Friends of the Levitt Pavilion MacArthur	600 00
	12/04/2008	120308	Friends of the Levitt Pavilion MacArthur	10,600.00
	12/23/2008	122308	Friends of the Levitt Pavilion MacArthur	17,000.00
Total 003 MacArthur Park				290,250 00
004 Arlington				
	07/11/2008	071008	Friends of the Levitt Pavilion Arlington	50,000.00
	09/05/2008	082908	Friends of the Levitt Pavilion Arlington	50,000.00
	10/23/2008	102008	Friends of the Levitt Pavilion Arlington	12,000.00
	02/04/2009	020209	Friends of the Levitt Pavilion Arlington	100,000.00
	02/12/2009	021109	Friends of the Levitt Pavilion Arlington	2,100.00
Total 004 Arlington				214,100.00
005 Memphis				
	06/30/2008	062608	Friends of the Levitt Pavilion Memphis	100,000.00
	07/25/2008	072508	Friends of the Levitt Pavilion Memphis	50,000.00
	08/14/2008	081408	Friends of the Levitt Pavilion Memphis	100,000 00
	08/21/2008	082008	Friends of the Levitt Pavilion Memphis	12,000 00
	02/19/2009	021809	Friends of the Levitt Pavilion Memphis	1,000.00
Total 005 Memphis				263,000.00
Total 002 Pavilions				1,998,330 00
TOTAL				**2,893,479.00**