



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , 2009, and ending

G Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name changeUse the
IRS label.
Otherwise,
print
or type.
See Specific
Instructions.HYMAN JEBB LEVY FOUNDATION
6634 VALJEAN AVE
VAN NUYS, CA 91406

A Employer identification number

23-7422872

B Telephone number (see the instructions)

818.781.4552

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, column (c), line 16)

\$ 4,206,399.

J Accounting method: ☐ Cash ☒ Accrual
☐ Other (specify) _____

(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 the instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc., received (att sch)

180.

2 Check ☒ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

8,347.

8,347.

8,347.

4 Dividends and interest from securities

70,559.

70,559.

70,559.

5a Gross rents

b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

-59,909.

b Gross sales price for all assets on line 6a 602,325.

7 Capital gain net income (from Part IV, line 2)

0.

8 Net short-term capital gain

0.

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit/(loss) (att sch)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

19,177.

78,906.

78,906.

13 Compensation of officers, directors, trustees, etc

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch) SEE ST 1

5,475.

5,475.

c Other prof fees (attach sch) SEE ST 2

19,001.

19,001.

17 Interest

18 Taxes (attach schedule)(see instr) SEE STM 3

762.

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

SEE STATEMENT 4

1,709.

24 Total operating and administrative expenses. Add lines 13 through 23

26,947.

24,476.

25 Contributions, gifts, grants paid PART XV

219,830.

26 Total expenses and disbursements. Add lines 24 and 25

246,777.

24,476.

0.

219,830.

219,830.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

-227,600.

b Net investment income (if negative, enter -0-)

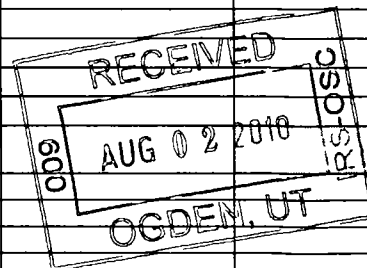
54,430.

c Adjusted net income (if negative, enter -0-)

78,906.

SCANNED AUG 05 2010

ADMINISTRATIVE AND EXPENSES



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
A S S E T S	1 Cash – non-interest-bearing			
	2 Savings and temporary cash investments	2,112,078.	706,641.	706,641.
	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 the instructions)			
	7 Other notes and loans receivable (attach sch) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) STATEMENT 5	1,780,135.	2,907,972.	3,171,099.
	c Investments – corporate bonds (attach schedule) STATEMENT 6	174,929.	174,929.	115,559.
	11 Investments – land, buildings, and equipment: basis ▶			
Less: accumulated depreciation (attach schedule) ▶				
12 Investments – mortgage loans				
13 Investments – other (attach schedule)				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶ SEE STATEMENT 7)	163,100.	213,100.	213,100.	
16 Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	4,230,242.	4,002,642.	4,206,399.	
L I A B I L I T I E S	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
N E T F U N D A S S E T B A L A N C E S	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	4,230,242.	4,002,642.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see the instructions)	4,230,242.	4,002,642.	
31 Total liabilities and net assets/fund balances (see the instructions)	4,230,242.	4,002,642.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year – Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,230,242.
2 Enter amount from Part I, line 27a	2	-227,600.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	4,002,642.
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	4,002,642.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a SEE STATEMENT 8				
b				
c				
d				
e				

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss).	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>		2	-59,909.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8 </div>		3	-2,486.

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 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 (column (b) divided by column (c))
2008	141,125.	4,097,985.	0.034438
2007	184,900.	4,305,288.	0.042947
2006	77,500.	4,037,598.	0.019195
2005	257,520.	4,011,544.	0.064195
2004	150,360.	3,925,894.	0.038300
2 Total of line 1, column (d)			2 0.199075
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 0.039815
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 3,597,353.
5 Multiply line 4 by line 3			5 143,229.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 544.
7 Add lines 5 and 6			7 143,773.
8 Enter qualifying distributions from Part XII, line 4			8 219,830.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instr.)			
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	544.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	544.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	544.
6 Credits/Payments:			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	3,255.	
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	3,255.	
8 Enter any penalty for underpayment of estimated tax Check here <input 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	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,711.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 2,711. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ \$ 0. (2) On foundation managers ▶ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities.</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XIV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) ▶ CA		
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? <i>If 'No,' attach explanation</i>	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses.</i>		X

BAA

Form 990-PF (2009)

Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		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? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>HYMAN JEBB LEVY</u> Telephone no <u>818-781-4552</u> Located at <u>6634 VALJEAN AVE VAN NUYS CA</u> ZIP + 4 <u>91406</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>			

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
1 a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? <input type="checkbox"/>	1 b	N/A
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
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 2009?	1 c	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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 the instructions)	2 b	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. <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3 a 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 2009 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 2009)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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 2009?	4 b	X

BAA

Form 990-PF (2009)

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

5b N/A

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

N/A

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? ☐ Yes ☒ No

If 'Yes' to 6b, file Form 8870.

6b X

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? ☐ Yes ☒ No

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 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
HYMAN LEVY 6634 VALJEAN AVE VAN NUYS, CA 91406	PRESIDENT 0	0.	0.	0.
DONNA LEVY 6634 VALJEAN AVE VAN NUYS, CA 91406	SECRETARY 0	0.	0.	0.

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

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

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

0

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 instructions). If none, enter 'NONE'.

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments See instructions.	
3	
Total. Add lines 1 through 3	0.

BAA

Form 990-PF (2009)

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	2,313,526.
b Average of monthly cash balances	1b	1,125,509.
c Fair market value of all other assets (see instructions)	1c	213,100.
d Total (add lines 1a, b, and c)	1d	3,652,135.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	3,652,135.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	54,782.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,597,353.
6 Minimum investment return. Enter 5% of line 5	6	179,868.

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

1 Minimum investment return from Part X, line 6	1	179,868.
2a Tax on investment income for 2009 from Part VI, line 5	2a	544.
b Income tax for 2009 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	544.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	179,324.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	179,324.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	179,324.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	219,830.
b Program-related investments — total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	219,830.
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 instructions)	5	544.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	219,286.

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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				179,324.
2 Undistributed income, if any, as of the end of 2009.				
a Enter amount for 2008 only			0.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005	39,088.			
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	39,088.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 219,830.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2009 distributable amount				179,324.
e Remaining amount distributed out of corpus	40,506.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	79,594.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	79,594.			
10 Analysis of line 9:				
a Excess from 2005	39,088.			
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009	40,506.			

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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 organization had \$5,000 or more in assets at any time during the year – see instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., (see 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 9

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

SEE STATEMENT FOR LINE 2A

- c** Any submission deadlines:

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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

Recipient	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
Name and address (home or business)				
a Paid during the year SEE STATEMENT 10				
Total			3a	219,830.
b Approved for future payment				
Total			3b	

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 the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion 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	8,347.	
4 Dividends and interest from securities			14	70,559.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18		-59,909.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				78,906.	-59,909.
13 Total. Add line 12, columns (b), (d), and (e)				13	18,997.

(See worksheet in the instructions for line 13 to verify calculations)

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

[illegible]

2009

FEDERAL STATEMENTS

PAGE 1

HYMAN JEBB LEVY FOUNDATION

23-7422872

STATEMENT 1
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	\$ 5,475.	\$ 5,475.		
TOTAL	<u>\$ 5,475.</u>	<u>\$ 5,475.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	\$ 19,001.	\$ 19,001.		
TOTAL	<u>\$ 19,001.</u>	<u>\$ 19,001.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

STATEMENT 3
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DEPT OF JUSTICE	\$ 25.			
FOREIGN TAX WITHHELD	727.			
FTB	10.			
TOTAL	<u>\$ 762.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

STATEMENT 4
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGE	\$ 39.			
MISCELLANEOUS	1,670.			
TOTAL	<u>\$ 1,709.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

STATEMENT 5
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
1400 COCA-COLA CO	MKT VAL	\$ 89,725.	\$ 79,800.
1066 REYNOLDS AMERICAN INC	MKT VAL	15,003.	56,466.
1 BERKSHIRE HATHAWAY INC	MKT VAL	37,811.	99,200.
1140 HILLMAN GRO CAP TR PFD (FROM CL A)	MKT VAL	32,739.	29,002.
500 JUNIPER NETWORKS	MKT VAL	58,362.	13,335.
500 CORTS BACKED TRUST - MOTOROLA	MKT VAL	12,940.	11,650.
1000 CORP BACKED TR - GOLDMAN SACHS GRP	MKT VAL	25,090.	21,350.
1000 JP MORGAN CHASE X1 5.875%	MKT VAL	24,730.	22,130.
3500 NUVEEN FLOATING RATE INCOME FUND	MKT VAL	46,593.	36,225.
981 LONDON STOCK EXCHANGE GROUP	MKT VAL	26,746.	11,374.
343 ALLEGHENY ENERGY INC	MKT VAL	11,541.	8,054.
5 BERKSHIRE HATHAWAY INC	MKT VAL	17,760.	16,430.
964 BROOKFIELD ASSET MANAGEMENT	MKT VAL	29,574.	21,382.
64 CNOOC LTD	MKT VAL	5,323.	9,949.
598 EL PASO CORPORATION	MKT VAL	7,306.	5,878.
1000 HONG KONG EXCHANGE	MKT VAL	7,041.	17,977.
449 IMPERIAL OIL LTD NEW	MKT VAL	18,153.	17,358.
274 LEGG MASON INC	MKT VAL	25,776.	8,264.
368 LEUCADIA NATIONAL CORP	MKT VAL	11,058.	8,755.
522 NASDAQ STOCK MARKET INC	MKT VAL	20,367.	10,346.
384 NYSE GROUP INC	MKT VAL	30,327.	9,715.
1499 RRI ENERGY INC	MKT VAL	16,560.	8,574.
46 ACCENTURE PLC IRELAND	MKT VAL	1,328.	1,909.
17 ALCON INC	MKT VAL	1,833.	2,794.
25 BARD C R INC	MKT VAL	1,898.	1,947.
24 EXPEDITORS INTERNATIONAL	MKT VAL	1,081.	834.
23 EXPRESS SCRIPTS INC COMMON	MKT VAL	962.	1,988.
41 ILLINOIS TOOL WORKS INC	MKT VAL	1,957.	1,968.
132 INTEL CORP	MKT VAL	2,593.	2,693.
36 JACOBS ENGINEERING GROUP INC	MKT VAL	1,897.	1,354.
54 OMNICOM GROUP INC	MKT VAL	2,412.	2,114.
50 PARKER HANNIFIN CORP	MKT VAL	2,306.	2,694.
68 QUALCOMM INC	MKT VAL	3,096.	3,146.
30 QUEST DIAGNOSTICS INC	MKT VAL	1,609.	1,811.
20 STRYKER CORP	MKT VAL	899.	1,007.
16 UNITED TECHNOLOGIES CORP	MKT VAL	1,129.	1,111.
35 VARIAN MEDICAL SYSTEMS INC	MKT VAL	1,756.	1,640.
102 WESTERN UNION CO	MKT VAL	2,240.	1,923.
56 XTO ENERGY INC	MKT VAL	1,979.	2,606.
190 CHICAGO BRIDGE & IRON CO	MKT VAL	4,699.	3,842.
90 CIRCOR INTL INC	MKT VAL	2,610.	2,266.
90 COMSTOCK RESOURCES INC	MKT VAL	2,989.	3,651.
70 DELTIC TIMBER CORP	MKT VAL	4,220.	3,233.
95 ENPRO INDUSTRIES INC	MKT VAL	3,623.	2,509.
185 FLOWERS FOODS INC	MKT VAL	3,576.	4,396.
70 L B FOSTER CO	MKT VAL	1,662.	2,087.
95 JOY GLOBAL INC	MKT VAL	6,393.	4,899.
175 KANSAS CITY SOUTHERN	MKT VAL	4,245.	5,826.
330 MUELLER WATER PRODUCTS INC	MKT VAL	3,179.	1,716.
290 NEWALLIANCE BANCSHARES INC	MKT VAL	4,183.	3,483.
230 PETROHAWK ENERGY CORPORATION	MKT VAL	3,021.	5,518.
70 RALCORP HOLDINGS INC	MKT VAL	2,511.	4,180.
195 TIMKEN CO	MKT VAL	6,660.	4,623.
385 WENDYS ARBYS GROUP INC	MKT VAL	6,661.	1,806.
225 WESTAR ENERGY INC	MKT VAL	4,730.	4,887.

STATEMENT 5 (CONTINUED)
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
180 WILLBROS GROUP INC	MKT VAL	\$ 3,886.	\$ 3,037.
160 WRIGHT EXPRESS CORP	MKT VAL	4,424.	5,098.
115 WYNDHAM WORLDWIDE CORPORATION	MKT VAL	3,473.	2,320.
100 AMB PROPERTY	MKT VAL	2,354.	2,055.
1000 BAYER AKTIENGESELLSCHAFT	MKT VAL	71,235.	80,618.
2000 EATON VANCE FLOATING RATE	MKT VAL	35,077.	28,320.
1019 FIRST TR/FOUR CORNERS	MKT VAL	17,090.	12,126.
1029 PIONEER FLOATING RATE TRUST	MKT VAL	18,647.	11,854.
5000 ZWEIG TOTAL RETURN FUND INC	MKT VAL	23,900.	19,550.
300 BRANDYWINE REALTY TRUST	MKT VAL	7,350.	6,765.
1000 COUNTRYWIDE CAPITAL IV	MKT VAL	19,035.	21,370.
1000 FPL GROUP CAP INC	MKT VAL	24,325.	25,690.
1000 VIACOM INC	MKT VAL	23,372.	23,950.
10000 BEIJING CAPITAL INTL LTD	MKT VAL	9,870.	6,620.
307 ENCANA CORP	MKT VAL	10,649.	9,944.
250 FANNIE MAE	MKT VAL	6,196.	295.
425 GAZPROM O A O	MKT VAL	17,735.	10,646.
230 ICICI BANK LTD	MKT VAL	10,253.	8,673.
38 ALLERGAN INC	MKT VAL	2,284.	2,394.
60 GILEAD SCIENCES INC	MKT VAL	2,373.	2,596.
58 INTUIT INC	MKT VAL	1,635.	1,782.
43 ITT CORPORATION	MKT VAL	2,536.	2,139.
26 RAYTHEON CO	MKT VAL	1,486.	1,340.
44 STANLEY WORKS	MKT VAL	2,422.	2,266.
47 WASTE MANAGEMENT INC	MKT VAL	1,602.	1,589.
100 ACUITY BRANDS INC	MKT VAL	4,151.	3,564.
280 BENEFICIAL MUTUAL BANCORP INC	MKT VAL	2,771.	2,755.
290 BROADRIDGE FINANCIAL SOLUTIONS	MKT VAL	5,374.	6,542.
140 EXCO RESOURCES INC	MKT VAL	2,249.	2,972.
80 FLOWSERVE CORP	MKT VAL	8,738.	7,562.
90 FOSTER WHEELER LTD	MKT VAL	5,320.	2,650.
100 GOODRICH PETROLEUM CORP	MKT VAL	5,426.	2,435.
50 DINEEQUITY INC	MKT VAL	2,850.	1,215.
170 MB FINANCIAL INC	MKT VAL	6,006.	3,351.
60 TENNANT CO	MKT VAL	2,930.	1,571.
150 WABTEC CORP	MKT VAL	6,923.	6,126.
90 WALTER ENERGY INC	MKT VAL	2,246.	6,678.
130 WESTFIELD FINANCIAL INC	MKT VAL	1,391.	1,073.
400 KOHLBERG CAPITAL CORP	MKT VAL	3,872.	1,824.
200 PENN WEST ENERGY CORP	MKT VAL	4,908.	3,520.
694 ANGLO AMERICAN PLC	MKT VAL	8,406.	15,191.
34 BHP BILLITON LTD	MKT VAL	2,562.	2,604.
375 CARNIVAL CORP	MKT VAL	14,269.	11,884.
615 CHINA UNICOM HONG KONG LTD	MKT VAL	7,470.	8,063.
2000 HENDERSON LAND DEVELOPMENT CO	MKT VAL	6,715.	15,062.
37 MASTERCARD INC	MKT VAL	8,081.	9,471.
355 PHILIP MORRIS INTL INC	MKT VAL	14,101.	17,107.
6 RIO TINTO PLC	MKT VAL	2,374.	1,292.
410 TIME WARNER INC	MKT VAL	14,409.	11,947.
243 WALT DISNEY CO	MKT VAL	5,430.	7,837.
24 BECTON DICKINSON & CO	MKT VAL	2,044.	1,893.
24 BUNGE LIMITED	MKT VAL	2,466.	1,532.
20 BURLINGTON NORTHERN SANTA FE CORP	MKT VAL	1,843.	1,972.
7 CME GROUP INC	MKT VAL	3,038.	2,352.
40 EMERSON ELECTRIC CO	MKT VAL	2,049.	1,704.

STATEMENT 5 (CONTINUED)
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
24 MCDONALDS CORP	MKT VAL	\$ 1,374.	\$ 1,499.
20 MONSANTO CO	MKT VAL	1,506.	1,635.
15 NIKE INC CL B	MKT VAL	1,014.	991.
15 NORFOLK SOUTHERN CORP	MKT VAL	1,037.	786.
34 PRAXAIR INC	MKT VAL	3,216.	2,731.
30 PROCTER & GAMBLE	MKT VAL	2,021.	1,819.
47 SCHLUMBERGER LTD NETHERLAND ANTILLES	MKT VAL	3,314.	3,059.
43 TEVA PHARMACEUTICALS IND LTD	MKT VAL	1,996.	2,416.
80 ARCH CHEMICALS INC	MKT VAL	3,092.	2,470.
150 BANKFINANCIAL CORP	MKT VAL	1,572.	1,485.
90 BRINKS HOME SECURITY HOLDINGS	MKT VAL	4,564.	2,938.
110 BUCYRUS INTL INC	MKT VAL	5,898.	6,201.
40 COMPASS MINERALS INTL INC	MKT VAL	2,969.	2,688.
180 COVANTA HOLDING CORP	MKT VAL	5,103.	3,256.
190 FIRST NIAGARA FINANCIAL GROUP	MKT VAL	2,545.	2,643.
120 FORESTAR GROUP INC	MKT VAL	2,964.	2,638.
210 HANESBRANDS INC	MKT VAL	4,991.	5,063.
80 HANOVER INSURANCE GROUP INC	MKT VAL	2,624.	3,554.
180 HILL ROM HOLDINGS INC	MKT VAL	4,026.	4,318.
90 KAISER ALUMINUM CORP	MKT VAL	5,376.	3,746.
40 TEXAS INDUSTRIES	MKT VAL	2,927.	1,400.
100 VAIL RESORT INC	MKT VAL	4,444.	3,780.
180 SPDR KBW REGL BANKING	MKT VAL	4,264.	4,005.
307 CENOVUS ENERGY INC	MKT VAL	10,029.	7,736.
142 CHINA LIFE INSURANCE	MKT VAL	6,844.	10,416.
35 CME GROUP INC	MKT VAL	6,299.	11,759.
512 DE LA RUE PLC	MKT VAL	8,150.	8,064.
110 GENZYME CORP	MKT VAL	6,033.	5,391.
592 GRUPO TELEVISIA SA DE CV GLOBAL	MKT VAL	12,079.	12,290.
151 HUANENG POWER INTL INC	MKT VAL	4,057.	3,382.
121 LENDER PROCESSING SERVICES INC	MKT VAL	5,168.	4,920.
102 TIME WARNER CABLE INC	MKT VAL	5,049.	4,222.
83 VORNADO REALTY TRUST	MKT VAL	2,699.	5,805.
472 MARKET VECTORS ETF TRUST GAMING	MKT VAL	9,485.	11,068.
141 ACTIVISION BLIZZARD INC	MKT VAL	1,584.	1,567.
35 AKAMAI TECHNOLOGIES INC	MKT VAL	884.	887.
41 AMPHENOL CORP NEW CL A	MKT VAL	1,270.	1,893.
53 EMC CORP MASS	MKT VAL	897.	926.
34 FLIR SYSTEMS INC	MKT VAL	779.	1,113.
11 GOLDMAN SACHS GROUP INC	MKT VAL	1,490.	1,857.
4 GOOGLE INC CL A	MKT VAL	1,814.	2,480.
14 INTL BUSINESS MACH	MKT VAL	1,627.	1,833.
35 ROSS STORES INC	MKT VAL	1,475.	1,495.
17 WATERS CORP	MKT VAL	751.	1,053.
30 WELLS FARGO & CO NEW	MKT VAL	852.	810.
60 ALLETE INC NEW	MKT VAL	1,587.	1,961.
80 EXTERRAN HOLDINGS INC	MKT VAL	1,915.	1,716.
210 FIRSTMERIT CORPORATION	MKT VAL	4,088.	4,229.
120 GALLAGHER ARTHUR J & CO	MKT VAL	2,876.	2,701.
80 IBERIABANK CORP	MKT VAL	3,522.	4,305.
80 INVESTMENT TECHNOLOGY GROUP	MKT VAL	2,056.	1,576.
70 ITC HOLDINGS CORP	MKT VAL	3,294.	3,646.
80 MCDERMOTT INTL INC	MKT VAL	986.	1,921.
120 PATTERSON COMPANIES INC	MKT VAL	2,235.	3,358.
150 PULTE HOMES INC	MKT VAL	1,853.	1,500.

STATEMENT 5 (CONTINUED)
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
200 TOLL BROTHERS INC	MKT VAL	\$ 3,981.	\$ 3,762.
90 TREEHOUSE FOODS INC	MKT VAL	2,561.	3,497.
100 VECTREN CORP	MKT VAL	2,343.	2,468.
54 WALTER INV MGMT CORP	MKT VAL	676.	774.
1512 AMAZON COM INC	MKT VAL	133,485.	203,394.
310 APPLE INC	MKT VAL	64,079.	65,327.
147 BAIDU INC ADR	MKT VAL	57,036.	60,451.
803 EDWARDS LIEFSCIENCE CP	MKT VAL	51,269.	69,741.
838 GREEN MTN COFFEE ROASTER	MKT VAL	55,864.	68,272.
524 MEDCOHEALTH SOLUTIONS	MKT VAL	27,966.	33,489.
1406 STARBUCKS CORP	MKT VAL	28,090.	32,422.
1085 TEVA PHARM INDS LTD ADRF	MKT VAL	50,331.	60,955.
1577 VISA INC CL A	MKT VAL	104,062.	137,924.
1207 ISHARES MSCI INDEX FUND	MKT VAL	41,514.	50,091.
1882 ISHARES TRUST INDEX FUND	MKT VAL	66,358.	79,533.
1720 MID CAP SPDR TRUST	MKT VAL	184,947.	226,593.
5674 POWERSHS QQQ TRUST SER I	MKT VAL	190,498.	259,585.
7450 SECTOR SPDR TECH SELECT	MKT VAL	125,530.	170,829.
60000 ALLY BK MIDVALE UTAH CD 2/12/10	MKT VAL	60,000.	60,000.
60000 ALLY BK MIDVALE UTAH CD 5/14/10	MKT VAL	60,000.	60,000.
60000 ALLY BK MIDVALE UTAH CD 8/13/10	MKT VAL	60,000.	60,000.
100000 CALIFORNIA ST GO BDS	MKT VAL	100,735.	97,061.
100000 FEDERAL HOME LOAN BANK	MKT VAL	100,000.	99,469.
	TOTAL	\$ 2,907,972.	\$ 3,171,099.

STATEMENT 6
FORM 990-PF, PART II, LINE 10C
INVESTMENTS - CORPORATE BONDS

CORPORATE BONDS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
1482 MICRON TECHNOLOGY	MKT VAL	\$ 49,954.	\$ 15,650.
6665 BLACKROCK STRATEGIC BOND TST	MKT VAL	99,975.	80,513.
25000 SLM CORP MEDIUM TERM 5.50%	MKT VAL	25,000.	19,396.
	TOTAL	\$ 174,929.	\$ 115,559.

STATEMENT 7
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

	BOOK VALUE	FAIR MARKET VALUE
L & R ASSOCIATES II LLC	\$ 50,000.	\$ 50,000.
PASSOVER HAGGADAH BOOKS	163,100.	163,100.
TOTAL	\$ 213,100.	\$ 213,100.

STATEMENT 8
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	71 VISA INC	PURCHASED	7/22/2008	2/27/2009
2	58 CNOOC LTD	PURCHASED	4/17/2006	3/02/2009
3	32 CNOOC LTD	PURCHASED	11/19/2007	3/02/2009
4	130 DEUTSCHE BOERSE AG	PURCHASED	11/18/2008	3/03/2009
5	100 LAS VAGAS SANDS	PURCHASED	7/30/2007	3/12/2009
6	105 LAS VAGAS SANDS	PURCHASED	8/14/2008	3/12/2009
7	20 LAS VEGAS SANDS	PURCHASED	8/09/2007	3/12/2009
8	50 LAS VEGAS SANDS	PURCHASED	8/24/2007	3/12/2009
9	254 NYSE EURONEXT	PURCHASED	4/17/2006	3/13/2009
10	150 UNION PACIFIC CORP	PURCHASED	6/11/2008	11/04/2009
11	80 BURLINGTON NORTHERN SANTA FE	PURCHASED	6/05/2008	12/01/2009
12	80 BURLINGTON NORTHERN SANTA FE	PURCHASED	6/05/2008	12/02/2009
13	37 AOL INC	PURCHASED	9/02/2008	12/29/2009
14	0.272 AOL INC	PURCHASED	9/02/2008	12/29/2009
15	4 UNITED STATES STL CORP NEW	PURCHASED	1/15/2008	1/26/2009
16	10 UNITED STATES STL CORP NEW	PURCHASED	2/14/2008	1/26/2009
17	40 WASTE MANAGEMENT INC DEL	PURCHASED	2/05/2007	2/09/2009
18	24 AFLAC INC	PURCHASED	4/26/2004	3/16/2009
19	9 AFLAC INC	PURCHASED	1/09/2007	3/16/2009
20	17 INTUIT INC	PURCHASED	3/28/2007	4/27/2009
21	23 PATTERSON COMPANIES	PURCHASED	4/26/2004	4/28/2009
22	23 PATTERSON COMPANIES	PURCHASED	5/24/2006	4/28/2009
23	11 PATTERSON COMPANIES	PURCHASED	5/23/2007	4/28/2009
24	21 RAYTHEON CO	PURCHASED	6/11/2007	6/08/2009
25	9 EXPRESS SCRIPT	PURCHASED	4/26/2004	7/15/2009
26	21 QUEST DIAGNOSTICS	PURCHASED	4/26/2004	7/15/2009
27	9 STRYKER CORP	PURCHASED	4/26/2004	7/15/2009
28	5 VARIAN MEDICAL SYSTEMS	PURCHASED	4/26/2004	7/15/2009
29	12 ACCENTURE LTD	PURCHASED	4/26/2004	7/27/2009
30	12 BURLINGTON NORTHERN SANTA FE	PURCHASED	2/08/2008	9/11/2009
31	1 BURLINGTON NORTHERN SANTA FE	PURCHASED	2/28/2008	9/11/2009
32	16 NIKE INC CL B	PURCHASED	1/10/2008	9/11/2009
33	32 ACCENTURE PLC IRELAND CL A	PURCHASED	4/26/2004	11/04/2009
34	18 QUEST DIAGNOSTICS	PURCHASED	4/26/2004	11/04/2009
35	27 AFFILIATED COMPUTER SERVICES	PURCHASED	4/26/2004	11/10/2009
36	18 AFFILIATED COMPUTER SERVICES	PURCHASED	1/23/2008	11/10/2009
37	75 XEROX	PURCHASED	4/18/2007	11/17/2009
38	75 XEROX	PURCHASED	5/22/2007	11/17/2009
39	40 XEROX	PURCHASED	7/16/2008	11/17/2009
40	285 HEXCEL CORP	PURCHASED	4/18/2006	1/26/2009
41	0.169 WALTER INV MGMT CORP	PURCHASED	4/20/2009	4/21/2009
42	0.169 WALTER INV MGMT CORP	PURCHASED	4/20/2009	4/21/2009
43	50 GOODRICH PETROLEUM CORP	PURCHASED	10/24/2007	2/03/2009
44	20 WEBSTER FINANCIAL	PURCHASED	7/24/2008	2/05/2009
45	50 WEBSTER FINANCIAL	PURCHASED	7/24/2008	2/06/2009
46	50 WEBSTER FINANCIAL	PURCHASED	8/05/2008	2/06/2009
47	40 WEBSTER FINANCIAL	PURCHASED	8/05/2008	2/09/2009
48	90 FLOWERS FOODS	PURCHASED	4/18/2006	4/09/2009
49	135 UNITIN INC	PURCHASED	4/18/2006	5/06/2009
50	95 AMERICAN RAILCAR INDUSTRIES	PURCHASED	4/18/2006	5/07/2009
51	130 COLFAX CORP	PURCHASED	6/27/2008	6/26/2009
52	50 WALTER ENERGY INC	PURCHASED	2/01/2007	7/14/2009
53	30 TEREX CORP SPT 7/17/06	PURCHASED	4/18/2006	7/24/2009
54	60 TEREX CORP SPT 7/17/06	PURCHASED	4/18/2006	7/27/2009
55	80 EXCO RESOURCES	PURCHASED	2/06/2007	8/04/2009
56	70 EXCO RESOURCES	PURCHASED	2/07/2007	8/04/2009

STATEMENT 8 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
57	50 EXCO RESOURCES	PURCHASED	3/15/2007	8/04/2009
58	35 RALCORP HOLDING	PURCHASED	4/18/2006	8/07/2009
59	90 BRINK'S COM	PURCHASED	4/18/2006	8/13/2009
60	100 TESCO CORP	PURCHASED	7/15/2008	9/10/2009
61	50 MCDERMOTT INTERNATIONAL SPL 6/1/06SPL 9/11/07	PURCHASED	4/18/2006	9/14/2009
62	70 MCDERMOTT INTL	PURCHASED	1/12/2009	9/14/2009
63	70 FMC TECHNOLOGIES SPL 9/4/07	PURCHASED	4/18/2006	10/13/2009
64	30 JOY GLOBAL	PURCHASED	4/18/2006	11/05/2009
65	40 BUCYRUS INTL INC	PURCHASED	1/23/2008	11/05/2009
66	90 IMS HEALTH INC UNSOLICITED	PURCHASED	12/08/2008	11/30/2009
67	80 IMS HEALTH INC UNSOLICITED	PURCHASED	12/10/2008	11/30/2009
68	90 PRIVATEBANCORP	PURCHASED	8/05/2008	11/02/2009
69	918 ISHARES S&P 500 GROWTH (IVW)	PURCHASED	11/03/2008	3/02/2009
70	1,647 ISHARES MSCI EMRG MKT (EEM)	PURCHASED	5/04/2009	6/25/2009
71	1,723 ISHARES TRUST INDEX FUNDFTSE (FXI)	PURCHASED	4/09/2009	6/30/2009
72	728 SYNAPTICS INC	PURCHASED	6/01/2009	7/31/2009
73	853 AECOM TECHNOLOGY (ACM)	PURCHASED	7/23/2009	9/08/2009
74	519 AMAZON COM	PURCHASED	6/01/2009	9/08/2009
75	346 APPLE INC (AAPL)	PURCHASED	7/23/2009	9/08/2009
76	785 ISHARES MSCI EMRG MKT (EEM)	PURCHASED	5/04/2009	9/08/2009
77	247 ISHARES TRUST INDEX FUNDFTSE (FXI)	PURCHASED	4/09/2009	9/08/2009
78	1,522 ISHARES TRUST INDEX FUNDFTSE (FXI)	PURCHASED	4/30/2009	9/08/2009
79	1,451 NETEASE .COM	PURCHASED	6/08/2009	10/13/2009
80	1,409 W M S INDUSTRIES INC (WMS)	PURCHASED	8/06/2008	11/09/2009

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	3,997.		5,009.	-1,012.				\$ -1,012.
2	4,487.		4,824.	-337.				-337.
3	2,459.		5,105.	-2,646.				-2,646.
4	6,413.		9,464.	-3,051.				-3,051.
5	173.		8,588.	-8,415.				-8,415.
6	182.		5,855.	-5,673.				-5,673.
7	35.		2,093.	-2,058.				-2,058.
8	87.		5,008.	-4,921.				-4,921.
9	4,096.		18,763.	-14,667.				-14,667.
10	8,290.		11,287.	-2,997.				-2,997.
11	7,863.		9,000.	-1,137.				-1,137.
12	7,860.		9,000.	-1,140.				-1,140.
13	866.		1,046.	-180.				-180.
14	6.		8.	-2.				-2.
15	123.		429.	-306.				-306.
16	307.		1,041.	-734.				-734.
17	1,201.		1,533.	-332.				-332.
18	321.		1,132.	-811.				-811.
19	121.		413.	-292.				-292.
20	418.		463.	-45.				-45.
21	455.		749.	-294.				-294.
22	455.		808.	-353.				-353.
23	218.		384.	-166.				-166.
24	939.		1,176.	-237.				-237.
25	581.		377.	204.				204.
26	1,134.		1,170.	-36.				-36.

STATEMENT 8 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
27	337.		404.	-67.				\$ -67.
28	158.		260.	-102.				-102.
29	407.		359.	48.				48.
30	1,001.		1,055.	-54.				-54.
31	83.		88.	-5.				-5.
32	873.		1,003.	-130.				-130.
33	1,200.		958.	242.				242.
34	1,020.		1,003.	17.				17.
35	1,482.		1,581.	-99.				-99.
36	988.		778.	210.				210.
37	591.		1,346.	-755.				-755.
38	591.		1,392.	-801.				-801.
39	315.		535.	-220.				-220.
40	1,848.		6,732.	-4,884.				-4,884.
41	1.		1.	0.				0.
42	1.		2.	-1.				-1.
43	1,485.		1,625.	-140.				-140.
44	76.		387.	-311.				-311.
45	171.		967.	-796.				-796.
46	171.		1,075.	-904.				-904.
47	140.		860.	-720.				-720.
48	2,149.		1,740.	409.				409.
49	2,265.		6,607.	-4,342.				-4,342.
50	848.		3,492.	-2,644.				-2,644.
51	1,018.		3,231.	-2,213.				-2,213.
52	1,855.		1,248.	607.				607.
53	417.		1,324.	-907.				-907.
54	823.		2,647.	-1,824.				-1,824.
55	1,176.		1,345.	-169.				-169.
56	1,029.		1,199.	-170.				-170.
57	735.		803.	-68.				-68.
58	2,226.		1,255.	971.				971.
59	2,398.		4,564.	-2,166.				-2,166.
60	770.		3,180.	-2,410.				-2,410.
61	1,330.		983.	347.				347.
62	1,862.		863.	999.				999.
63	3,716.		1,756.	1,960.				1,960.
64	1,533.		2,057.	-524.				-524.
65	1,823.		1,372.	451.				451.
66	1,938.		1,191.	747.				747.
67	1,723.		1,031.	692.				692.
68	834.		2,592.	-1,758.				-1,758.
69	34,309.		42,527.	-8,218.				-8,218.
70	51,637.		50,681.	956.				956.
71	65,406.		54,554.	10,852.				10,852.
72	17,851.		26,655.	-8,804.				-8,804.
73	23,384.		28,063.	-4,679.				-4,679.
74	40,510.		43,135.	-2,625.				-2,625.
75	57,665.		54,561.	3,104.				3,104.
76	27,493.		24,156.	3,337.				3,337.
77	9,605.		7,821.	1,784.				1,784.
78	59,186.		48,669.	10,517.				10,517.
79	57,563.		53,296.	4,267.				4,267.

2009

FEDERAL STATEMENTS

PAGE 9

HYMAN JEBB LEVY FOUNDATION

23-7422872

STATEMENT 8 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
80	59,222.		56,500.	2,722.				\$ 2,722.
							TOTAL	\$ -59,909.

STATEMENT 9
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:
NAME: HYMAN LEVY
CARE OF:
STREET ADDRESS: 6634 VALJEAN AVE
CITY, STATE, ZIP CODE: VAN NUYS, CA 91406
TELEPHONE:
FORM AND CONTENT: NO SPECIFIC FORM. BACKGROUND INFORMATION & BROCHURE ON APPLICANT
SUBMISSION DEADLINES: NONE
RESTRICTIONS ON AWARDS: NONE

STATEMENT 10
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
BETH MIDRASH MISHKAN ISRAEL SHERMAN OAKS, CA	NONE	PUBLIC	GENERAL	\$ 9,500.
AMERICAN FRIENDS OF ISRAEL ELWYN PHILADELPHIA, PA	NONE	PUBLIC	GENERAL	4,600.
GIMMEL FOUNDATION NEW YORK, NY	NONE	PUBLIC	GENERAL	20,000.
CONGREGATION YAD MOSHE BROOKLYN, NY	NONE	PUBLIC	GENERAL	1,000.
ISRAEL SPECIAL KIDS FUND NEW YORK, NY	NONE	PUBLIC	GENERAL	10,500.
JEWISH LIFE FOUNDATION ENCINO, CA	NONE	PUBLIC	GENERAL	7,500.

STATEMENT 10 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
LOS ANGELES GROUP FOR THE BLIND OF ISRAEL NORTHRIDGE, CA	NONE	PUBLIC	GENERAL	\$ 1,000.
GESHER FOUNDATION INC NEW YORK, NY	NONE	PUBLIC	GENERAL	1,800.
MAIMODES ACADEMY LOS ANGELES, CA	NONE	PUBLIC	GENERAL	10,000.
KAHAL LEVY WEST HILLS, CA	NONE	PUBLIC	GENERAL	10,000.
TORAT HAYIM HEBREW ACADEMY LOS ANGELES, CA	NONE	PUBLIC	GENERAL	1,180.
SEPAHARDIC TEMPLE TIFERETH ISRAEL LOS ANGELES, CA	NONE	PUBLIC	GENERAL	27,750.
SEPHARDIC TRADITION & RECREATION VAN NUYS, CA	NONE	PUBLIC	GENERAL	105,000.
WEST COAST TORAH CENTER BEVERLY HILLS, CA	NONE	PUBLIC	GENERAL	5,000.
LOS ANGELES JEWISH HOME FOR THE AGING RESEDA, CA	NONE	PUBLIC	GENERAL	5,000.
TOTAL				\$ 219,830.