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Form 990-PF

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

r or ca	lendar year 2009, or tax year beginning		, and ending		
G Ch	eck all that apply. 🔲 Initial return 🔃 Initia	al Return of a former p	ublic charity	Fina	al return
	Amended return	Address	change Name o	change	
Use	he	 	Α	Employer identification nun	nber
IRS la	bel The M. B. Lewis Charitabl	e Foundation		52-1557778	
Other	1 1 2 2 0 ROXAIII A RO IVI		В	Telephone number (see the	instructions)
prii or ty					
See Sp	ecific		С	If exemption application is	pending, check here
Instruc	tions		D	1 Foreign organizations, chec	· -
H	Check type of organization. X Section 501	(c)(3) exempt private for	oundation	2 Foreign organizations meet	لنبنا
[Section 4947(a)(1) nonexempt charitable tru		private foundation	here and attach computatio	n P
I F		ounting method. X C		If private foundation status	
		Other (specify)		under section 507(b)(1)(A)	
▶ 5		column (d) must be or	rash basis	If the foundation is in a 60- under section 507(b)(1)(B)	check here
Part I			I	· · · · · · · · · · · · · · · · · · ·	CHOOK HOLD
77171	Expenses (The total of amounts in	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable
	columns (b), (c), and (d) may not neces-	exherises her nooks	lincome	income	purposes
	sarily equal the amounts in column (a)				(cash basis only)
	(see the instructions).) 1 Contributions, gifts, grants, etc, received (att sch)			1	
	2 Ck X if the foundn is not req to att Sch B				······
	3 Interest on savings and temporary	7878****			
	cash investments				
	4 Dividends and interest from securities	3,325.	3,325.	3,325.	1 101 11 111 3-4
	5a Gross rents				
	b Net rental income or (loss)		Statement 1		
Ŗ	6a Net gain/(loss) from sale of assets not on line 10	5,876.			
R E V	b Gross sales price for all assets on line 6a 14,691.				
E N	7 Capital gain net income (from Part IV, line 2)		18.		
N U	8 Net short-term capital gain			, , , , , , , , , , , , , , , , , , , ,	
Ĕ	9 Income modifications	······			
	10 a Gross sales less returns and allowances			[
	h Less Cost of				
3	c Gross profit/(loss) (att sch)				
3	11 Other income (attach schedule)				
ð	The Other medine (attach schedule)				· ·
	12 Total. Add lines 1 through 11	9,201.	3,343.	3,325.	
	13 Compensation of officers, directors, trustees, etc	0.	5,343.	5,525.	
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits			~ ~ ~	
А	16a Legal fees (attach schedule)	· -	.14		
D M	b Accounting fees (attach sch) See St 2	2,625.	2,625.		2,625.
i N	c Other prof fees (attach RECEIVED	1			
0 1	17 Interest				
PS	18 Taxes (attach schehule)(see instr.)	080-8			 -
E T R R A T	19 Depreciation (attack PR 1 2 2010 sch) and depretion	Ö			······································
- 1 i		(8)			
N Ý G E	20 Occupancy	<u>&</u>			
	21 Travel, conferences and publications				
A E N X D P	23 Other expenses (attach schedule)	<u></u>			
E	See Statement 3	340.	340.		340.
N S	24 Total operating and administrative				<u> </u>
E S	expenses. Add lines 13 through 23	2,965.	2,965.		2,965.
	25 Contributions, gifts, grants paid Stmt 4	8,022.			8,022.
	26 Total expenses and disbursements.	10 005	0.06-		
	Add lines 24 and 25 27 Subtract line 26 from line 12:	10,987.	2,965.	0.	10,987.
	27 Subtract line 26 from line 12: a Excess of revenue over expenses	į			
	and disbursements	-1,786.			
	b Net investment income (if negative, enter 0)		378.		
	C Adjusted net income (if negative, enter 0)			3,325.	



Par	t ti	Balance Sheets column should be for end of year amounts only	Beginning of year	Lilu o	· , · · · · · · · · · · · · · · · ·
-	1	(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	g	5,908.	12,499.	12,715.
	2				······
	3			-	
	١.	Less. allowance for doubtful accounts			
	4				
	_	Less. allowance for doubtful accounts			
	5				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7				
A		Less. allowance for doubtful accounts			
S	8	Inventories for sale or use		-	
A S E T	9	Prepaid expenses and deferred charges		<u> </u>	
s	10	a Investments — U.S. and state government			
		obligations (attach schedule)			
		b Investments — corporate stock (attach schedule)	95,959.	87,582.	126,544.
		c Investments — corporate bonds (attach schedule)			······
	11	Investments — land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
		Investments – mortgage loans			
	13				
	14				
		Less accumulated depreciation (attach schedule)			
	15 16	Other assets (describe Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)	101,867.	100,081.	139,259.
Ļ	17			·- ·	:
I A	18	Grants payable			
A B	19	Deferred revenue			
Ľ	20	Loans from officers, directors, trustees, & other disqualified persons			
ļ	21	Mortgages and other notes payable (attach schedule)			• •
i	22	Other liabilities (describe			
E S	23	` '	0.	0.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
NF	24	Unrestricted			
N F E U T N	25	Temporarily restricted			
D	26	Permanently restricted			
A B A L T		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
E L T A S N	27	Capital stock, trust principal, or current funds			
SNC	28	Paid-in or capital surplus, or land, building, and equipment fund	4.64		
O E	29	Retained earnings, accumulated income, endowment, or other funds.	101,867.	100,081.	
ŔŚ	30	Total net assets or fund balances (see the instructions) Total liabilities and net assets/fund balances	101,867.	100,081.	
	31	(see the instructions)	101,867.	100,081.	
Par	111	Analysis of Changes in Net Assets or Fund Balanc		<u> </u>	
1	Tota	il net assets or fund balances at beginning of year – Part II, colum	nn (a), line 30 (must agre	ee with	
	end-	of-year figure reported on prior year's return)	· · · · · · · · · · · · · · · · · · ·	1	101,867.
2		er amount from Part I, line 27a		2	
3		increases not included in line 2 (itemize)		3	
4		lines 1, 2, and 3		4	100,081.
5		eases not included in line 2 (itemize)		5	100 001
6_	Lota	l net assets or fund balances at end of year (line 4 minus line 5) -	- Part II, column (b), line	30 6	100,081.

(a) List and descri	Losses for Tax on Investment be the kind(s) of property sold (e.g., re- use, or common stock, 200 shares MLC	al estate,	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year
1a			B - Bollation		
b					
c		. – · · · · · · · · · · · · · · · · · · 	_		
d			-		·
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sa		(h) Gain or (e) plus (f) m	
a					
b		<u> </u>			
С					
d					
е					
	ring gain in column (h) and owned by the			(I) Gains (Coli	
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if a		gain minus column (I nan -0-) or Losses (fr	
a		***			
b					
С					
d					
е					
2 Capital gain net income or (ne	et capital loss) If gain, also eif (loss), ente	enter in Part I, line 7 er -0- in Part I, line 7	. 2		18
3 Net short-term capital gain or	(loss) as defined in sections 1222(5) an	d (6)			
If gain, also enter in Part I. lin	e 8, column (c) (see the instructions). If	(loss) enter -0-	Ì		
in Part I, line 8	e o, column (c) (see the manachons). In	(1035), eriter -0-	3		
Part V Qualification Unde	er Section 4940(e) for Reduced	Tax on Net Investme	ent Income		
f 'Yes,' the foundation does not qua	ction 4942 tax on the distributable amou lify under section 4940(e) Do not comp	olete this part.		Yes	N₀
	ın each column for each year, see the ıı		iny entries		
(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use ass	sets (col	(d) Distribution umn (b) divided	
2008					
2007					
2006					
2005					
2004					
					
2 Total of line 1, column (d)			2		
Average distribution ratio for the number of years the foundation	ne 5-year base period — divide the total n has been in existence if less than 5 ye	on line 2 by 5, or by the ears	3		
•	itable-use assets for 2009 from Part X,		4		
	nable-use assets for 2003 from Fart X,	inie 5	<u> </u>		
5 Multiply line 4 by line 3			5		
6 Enter 1% of net investment inc	come (1% of Part I, line 27b)		6		
7 Add lines 5 and 6			7		<u>.</u> .
8 Enter qualifying distributions fr	om Part XII, line 4		8		
If line 8 is equal to or greater t Part VI instructions.	han line 7, check the box in Part VI, lin	e 1b, and complete that par	rt using a 1% ta	x rate. See the	

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Par		ions)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here			
	Date of ruling or determination letter (attach copy of letter if necessary - see instr.)			
t	Domestic foundations that meet the section 4940(e) requirements in Part V,		•	8.
	check here and enter 1% of Part I, line 27b			
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-)			0.
3	Add lines 1 and 2			8.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			8.
6	Credits/Payments Credits/Payments			
ā	2009 estimated tax pmts and 2008 overpayment credited to 2009			
t	Exempt foreign organizations — tax withheld at source			
•	: Tax paid with application for extension of time to file (Form 8868)			
c	Backup withholding erroneously withheld			
	Total credits and payments Add lines 6a through 6d			0.
8	Enter any penalty for underpayment of estimated tax. Check here			
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			8.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11	Enter the amount of line 10 to be Credited to 2010 estimated tax			
	t VII-A Statements Regarding Activities			
		T	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?	1a	162	X
t	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		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.			
	Did the foundation file Form 1120-POL for this year?	1 c		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on		1	
	foundation managers \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X_
	If 'Yes,' attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	3		х
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Х	
	olf 'Yes,' has it filed a tax return on Form 990-T for this year?	4b		Х
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х
	If 'Yes,' attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either.		į	
	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_	<u> </u>
	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	X	ļ
8 a	Enter the states to which the foundation reports or with which it is registered (see the instructions) N/A		ı	
h	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	8ь	Х	l
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)? If 'Yes,' complete Part XIV	9		х
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names			
	and addresses	10		X

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Par	t 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		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address N/A	application?	13	Х	
14	The books are in care of ► Phillip S. Lewis Telephor				-
	Located at ► 1528 Roxanna Rd NW, Washington, DC ZIP + 4		.8		- - -
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	-45	N/A		
	and enter the amount of tax-exempt interest received or accrued during the year	► 15			N/A
Par	t 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 8	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?	Yes X No			ĺ
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No			ĺ
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X 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 X 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 X No			
i	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 instruction	ns) ⁷	1 b	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 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)).				
á	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?	Yes X No			
	If 'Yes,' list the years ► 20 , 20 , 20				
l	b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(in trelating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(in the instructions.)		2b	N	/A
•	to If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years h	ere			
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X No			
ŀ	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 approve 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.)	d	3ь	N	/A
48	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4 a		<u> </u>
	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?		4b		X
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Part VII-B Statements Regarding Activit	ies for Which Forn	n 4720 May Be Red	uired (continue	?d)			
5a During the year did the foundation pay or incur	r any amount to.			_		1	
(1) Carry on propaganda, or otherwise attemp	t to influence legislation	n (section 4945(e))?	Yes	X No			
(2) Influence the outcome of any specific publi on, directly or indirectly, any voter registra	tion drive?	•	Yes	X No			
(3) Provide a grant to an individual for travel,	study, or other similar p	ourposes?	Yes	X No		1	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	ian a charitable, etc, org 4940(d)(2)? (see instruc	ganization described ctions)	Yes	X No			
(5) Provide for any purpose other than religious educational purposes, or for the prevention			Yes	X No			
b If any answer is 'Yes' to 5a(1)-(5), did any of the described in Regulations section 53.4945 or in (see instructions)?	he transactions fail to q a current notice regard	ualify under the exception	ons		5b	N/	Ά
Organizations relying on a current notice regar	ding disaster assistance	e check here	•		- 32		
c If the answer is 'Yes' to question 5a(4), does to tax because it maintained expenditure responsing 'Yes,' attach the statement required by Regulations.	sibility for the grant?	·	N/A Yes	☐ No			
6a Did the foundation, during the year, receive an on a personal benefit contract?	ıy funds, directly or ındı	rectly, to pay premiums	Yes	XNo			
b Did the foundation, during the year, pay premi	ums, directly or indirect	ly, on a personal benefi			6Ь		X
7a At any time during the tax year, was the found	ation a party to a probit	nited tay shelter transac	tion? Yes	XNo		1	
b If yes, did the foundation receive any proceeds				<u> </u>	7b	N	Α
Part VIII Information About Officers, D				aid Emp			
and Contractors		·		<u> </u>			
1 List all officers, directors, trustees, foundation	managers and their co	mpensation (see instru	ctions).				
(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions employee benef plans and deferre compensation	ıt 🗎 oth	xpense ier allo		
Phillip S. Lewis	President	0.	-).			0
1528 Roxanna Rd, NW] o						
Washington, DC 20012							
Bessie C. Lewis	Sec/Treas	0.	().			0
1528 Roxanna Rd, NW	0						
Washington, DC 20012							
2 Compensation of five highest-paid employees	Other than those inclu	 ded on line 1— see inst	ructions) If none e	nter 'NON		· · ·	
(a) Name and address of each employee	(b) Title and average	(c) Compensation	(d) Contributions		xpense	acco	unt.
paid more than \$50,000	hours per week devoted to position	()	employee benefi plans and deferre compensation	it oth	ier allo		
None			portion		-		
			_	_			
						_	
			 				
Total number of other employees paid over \$50,000		<u> </u>		•			0
				-			

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	Employees,
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 Ohev Sholom Schul	
	1,425.
2 B'nai Israel Congregation	
	1,060.
3 Adas Israel Congregation	
	1,000.
4 Yeshiva University	
	1,000.
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 <u>N/A</u>	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0.
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Part X Minimum Investment Return (All domestic foundations must complete this part. I 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	
b Average of monthly cash balances	1 b	
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1 d	0.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)	_	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	0.
6 Minimum investment return. Enter 5% of line 5	6	0.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private ope and certain foreign organizations check here ► ☐ and do not complete this p		ndations
1 Minimum investment return from Part X, line 6	1	
2a Tax on investment income for 2009 from Part VI, line 5		
b Income tax for 2009. (This does not include the tax from Part VI.)]	
c Add lines 2a and 2b	2c	8.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	-8.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	-8.
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	0.
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	1 a	10,987.
b Program-related investments — total from Part IX-B	1 b	
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	10,987.

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.

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)

6 Adjusted qualifying distributions. Subtract line 5 from line 4

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10,987.

6

Part XIII Undistributed Income (see instructions)

Distributable amount for 2009 from Part XI, Inter 7		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
2. Undistributed means, 1 any, as of the reid of 2008 a Enfort amount for 2008 only 0 0 0 0 0 0 0 0 0					0.
b Total for prior years 20 20 20 30	2 Undistributed income, if any, as of the end of 2009:	***************************************			
3 Deces distributions carpover, if any, to 2009 a From 2004 11, 998. b From 2005 c From 2006 6 8, 535. d From 2007 e From 2008 12, 034. 1 Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4 * \$ 10, 987. A Applied to 2008, but not more than line 2a A Applied to 2008, but not more than line 2a A Applied to undistributed income of prory years (Election required – see instructions) C Treated as distributions out of corpus (Election required – see instructions) C Treated as distributions out of corpus (Election required – see instructions) C Treated as distributions out of corpus (Election required – see instructions) O. d Applied to 2009 distributable amount R Remaining amount distributed out of corpus (Election required – see instructions) O. d Applied to 2009 distributable amount R Remaining amount distributed out of corpus (If a amount appears in column (0), the same amount mast be shown in column (a), be same amount mast be shown in column (a), be same amount mist be distributed income for 2008 Subtract line 5 Prory years' undistributed income. Subtract line 4 for line 2b C Enter the net total of each column as indicated below: a corpus and line 3b Prory years' undistributed income. Subtract line 4 d subtract line 6c from line 6b Taxable amount – see instructions Undistributed income for 2008 Subtract lines 4 d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of copys to sality requirements imposed by section 170(0)(1)(c) or 4942(g)(5) (see instructions) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 9 Excess from 2006 B Excess from 2006 B Excess from 2006 C Excess from 2006	a Enter amount for 2008 only			0.	
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4 From 2008					
From 2008	c From 2006 8,535	5.			
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4. Qualifying distributions for 2009 from Part XIII, line 4		 1			
XII, line 4 ▶ \$ 10, 987. a Applied to 2008, but not more than line 2a b Applied to undistributed amome of prior years (Election required — see instructions) c Treated as distributions out of corpus (Election required — see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions earryove applied to 2009 (if an amount appears in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a). 6 Exter the net total of each column as indicated below: a Carpus Add lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the net work of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) task as been previously assessed d Subtract line 6c from line 6b Taxable amount — see instructions d Undistributed income for 2008 Subtract lines 4a from line 2a Taxable amount — see instructions Undistributed in 2010 Undistributed in 2010 Undistributed in 2010 Undistributed in 2010 Amounts freated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3) (see instructions) Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) Excess from 2006 B Excess from 2006 B Excess from 2006 B Excess from 2006 C Excess from 2007 C Excess from 2008		32,567.			
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4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9. a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 12,034.				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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9. a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 12,034.	4d and 5 from line 1. This amount must be	s			0.
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9. a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 11,998. 31,556.	corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0			
9 Excess distributions carryover to 2010. 31,556. Subtract lines 7 and 8 from line 6a 31,556. 10 Analysis of line 9. a Excess from 2005 b Excess from 2006 8,535. c Excess from 2007 d Excess from 2008	8 Excess distributions carryover from 2004 no	t			
10 Analysis of line 9. a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 12,034.	9 Excess distributions carryover to 2010.				
a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 12,034.		31,330.			
b Excess from 2006 8,535. c Excess from 2007 d Excess from 2008 12,034.					
c Excess from 2007 d Excess from 2008 12,034.				1	
d Excess from 2008 12,034.		-	[
				•	

Form 990-PF (2009) The M. B. Lewis			\/// A	52-1557778	
Part XIV Private Operating Foundati					N/A
1a If the foundation has received a ruling or one is effective for 2009, enter the date of the	ruling	·	-	•	
b Check box to indicate whether the foundate		rating foundation de		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years	, 	
investment return from Part X for each year listed	(a) 2009	(b) 2008	(c) 2007_	(d) 2006	(e) Total
b 85% of line 2a					
 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				_	
 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)	<u></u>				
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()(3)(B)(III)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income	L		<u> </u>		
Part XV Supplementary Information assets at any time during t	(Complete this ne year – see ir	part only if the structions.)	e organization h	nad \$5,000 or mo	ore in
Information Regarding Foundation Managa List any managers of the foundation who is close of any tax year (but only if they have None	nave contributed mo	ore than 2% of the to han \$5,000) (See s	otal contributions resection 507(d)(2).)	ceived by the founda	ition before the
b List any managers of the foundation who	own 10% or more of	the stock of a corp	oration (or an equal	lly large portion of the	e ownership of
a partnership or other entity) of which the None	foundation has a 10	% or greater intere	st.	.,go portion or a.	
2 Information Regarding Contribution, Gran	t Gift Loon Sabala	archin eta Pro	Act		
Check here \(\overline{\mathbb{X}} \) if the foundation only requests for funds If the foundation make complete items 2a, b, c, and d	nakes contributions	to preselected char	itable organizations	and does not accep nizations under othei	t unsolicited r conditions,
a The name, address, and telephone number	er of the person to w	vhom applications s	hould be addressed		-
b The form in which applications should be s	submitted and inforn	nation and material	s they should includ	e	
c Any submission deadlines.					
d Any restrictions or limitations on awards, s	such as by geograph	nical areas, charitat	ole fields, kinds of in	stitutions, or other fa	actors.
					

TEEA0310L 07/06/09

Form 990-PF (2009)

BAA

Page 11

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	Purpose of grant or contribution	Amount		
Name and address (home or business)	substantial contributor	recipient				
a Paid during the year	substantial contributor					
Total			► 3a			
b Approved for future payment Total			► 3h			

Part XVI-A Analysis of Income-Producing Activities

Form 990-PF (2009)

inter gross amounts unless otherwise indicated.	Unrelated b	ousiness income	Excluded	by section 512, 513, or 514	
Program service revenue:	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions)
a	_				· · · · · · · · · · · · · · · · · · ·
b					
с					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					3,325.
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	212000	5,876.			-
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
е					
12 Subtotal. Add columns (b), (d), and (e)		5,876.			3,325.
13 Total. Add line 12, columns (b), (d), and (e)				13	9,201.
e Subtotal. Add columns (b), (d), and (e)	alculations)	5,876.		13	

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 the instructions.)	
3	Income contributed solely to charitable organizations.	
4	Income contributed solely to charitable organizations.	

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

								F		
	descr	ne organization directly libed in section 501(c) on the political organization	of the Code (ot	ngage in any of t her than section	the following with 501(c)(3) organi	any other organi zations) or in sec	ization tion 527,		Yes	No
		fers from the reporting		a noncharitable	exempt organiza	tion of.				
	(1) C							1a (1)		x
	(2) C	ther assets						1a (2)		X
	b Other	transactions.								
	(1) S	ales of assets to a nor	icharitable exe	mot organization	ı			1 b (1)		X
		urchases of assets from						1b (2)		X
	-	ental of facilities, equip			ii ii zatioii			1b (3)		X
		leimbursement arrange		45500				1b (4)		X
		oans or loan guarantee						1b (5)		X
		erformance of services		in or fundraicing	collectations			1b (5)		X
										X
	Conan	ng of facilities, equipm	ent, mailing ils	is, other assets,	or paid employe	es		1c		
	the q	oods, other assets, or :	services aiven	by the reporting	foundation. If the	e foundation rece	ld always show the fair n ived less than fair marke sets, or services receive	t value in	e of	
(a) Line no	(b) Amount involved		of noncharitable exen			n of transfers, transactions, and		gement	s
	/A				. •	, , , , , , , , , , , , , , , , , , , ,	,,	J 		
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	descr	foundation directly or ibed in section 501(c) of s,' complete the followi	of the Code (ot	ited with, or rela her than section	ted to, one or mo 501(c)(3)) or in s	ore tax-exempt or section 527?	ganızatıons	Yes	X	No
		(a) Name of organizati		(b) Type	e of organization		(c) Description of re	lationship		
N	/A	· · · · · · · · · · · · · · · · · · ·								
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\neg	Under pena	Ities of periury. I declare that I h	ave examined this re	turn, including accomp	anving schedules and s	tatements, and to the be	st of my knowledge and belief it is	true correct a	nd	
	complete	Declaration of preparer (other	than taxpayer or fi	duciary) is based on a	all information of which	preparer has any kno	est of my knowledge and belief, it is wledge	auc, correct, a		
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GN	Sign	ature of officer or trustee	<u> </u>			Date	Title	_		
- 1			10	4/	_	Date /	Charles (Carlotte	parer's Identify	ing num	iber
HERE	Paid	Preparer's signature	1/2 000	Jul		1 3/20/1	l self	e Signature in		15)
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	Only	address, and	na, VA 22			- <u>-</u> .		02) 255	F 0.0	· c
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BA	VA							Form 99	0-PF	(2009)

2009

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The M. B. Lewis Charitable Foundation

52-1557778

Statement 1 Form 990-PF, Part I, Line 6a Net Gain (Loss) from Noninventory Sales Per Books Assets Not Included in Part IV

Description:

214.2187 Schwab / Freeport McM Copper

Date Acquired: How Acquired:

Various Purchase 9/08/2009

Date Sold: To Whom Sold:

Schwab

Gross Sales Price: Cost or Other Basis: 14,691. 8,815.

Basis Method:

Cost

Depreciation:

Gain (Loss)

5,876.

Total 💲 5,876.

Statement 2 Form 990-PF, Part I, Line 16b Accounting Fees

Tax return prep

(b) Net (c) (d) (a) Adjusted Expenses Investment Charitable Income Net Income Purposes per Books 2,625. \$ 2,625. \$ 2,62<u>5.</u> 2,625. 2,625. Total \$ 2,625. \$ 2,625.

Statement 3 Form 990-PF, Part I, Line 23 Other Expenses

Office expense Postage

(b) Net (d) (a) (c) Investment Charitable Expenses Adjusted per Books <u> Income Net Income</u> Purposes 336. \$ 336. 336. 340. 340. Total \$ 340.

Statement 4 Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants

Cash Grants and Allocations

Class of Activity:

General programs Capital Āreā Food Bank

Donee's Name: Donee's Address:

645 Taylor St NE Washington, DC 20017

Relationship of Donee:

none

Organizational Status of Donee:

501(c)(3)

Amount Given:

\$

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The M. B. Lewis Charitable Foundation

52-1557778

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Statement 4 (continued)
Form 990-PF, Part I, Line 25
Contributions, Gifts, and Grants

Class of Activity: Donee's Name: Donee's Address:

Relationship of Donee: Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name: Donee's Address:

Relationship of Donee: Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name: Donee's Address:

Relationship of Donee: Organizational Status of Donee:

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Class of Activity: Donee's Name:

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Class of Activity:

Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee: Amount Given:

Class of Activity:

Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee: Amount Given:

Class of Activity: Donee's Name:

Donee's Address: Relationship of Donee:

Organizational Status of Donee:

Amount Given:

General programs House of Ruth

5 Thomas Cir NW Washington, DC 20005

none 501 (c) (3)

> General programs Bread for the City 1525 7th St NW

Washington, DC 20001 none

501 (c) (3)

General programs Ohev Sholom Congregation 1600 Jonquil Ave NW

Washington, DC 20012 none

501 (c) (3)

General programs Beth Sholom Congregation 11825 Seven Locks Rd

Potomac, MD 20854

none 501 (c) (3)

General programs Chabad

5713 Bradley Blvd Bethesda, MD 20814

none 501 (c) (3)

General programs Civitan International Foundation

One Civitan Place Birmingham , AL 35213

none 501 (c) (3)

General programs Wiesenthal Center 1399 South Roxbury Los Angeles, CA 90035

none 501 (c) (3)

Class of Activity: General purpose

200.

17.

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The M. B. Lewis Charitable Foundation

52-1557778

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Statement 4 (continued) Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants

Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name:

Donee's Address:

Relationship of Donee: Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

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Amount Given:

Class of Activity: Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name:

Donee's Address:

Relationship of Donee:

Organizational Status of Donee: Amount Given:

Class of Activity: General programs

Donee's Name:

Ner Israel Yeshiva 400 Mt Wilson

Baltimore, MD 21208

none

501 (c) (3)

General programs

National Parks Conservation Association

1300 19th Street, NW, Suite 300

Washington, DC 20036

501(c)(3)

General programs Jewish Federation

6101 Montrose Rd Rockville, MD 20852

none

501 (c) (3)

General programs

WETA

Washington, DC

none

501 (c) (3)

General programs Orthodox Union 11 Broadway NY, NY 10004

none

501(c)(3)

General programs

Adas Israel Congregation 2850 Quebec Street NW Washington, DC 20008

none

501 (c) (3)

General programs Chai Lifeline / Camp Simcha UK

746 Finchley Rd

London, NW11 7TH United Kingdom none

501 (c) (3)

Leon Leif Children Fund

200.

1,000.

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The M. B. Lewis Charitable Foundation

52-1557778

50.

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\$

Statement 4 (continued) Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants

Donee's Address: 25 Lawrence Ave Lawrence, NY 11559

Relationship of Donee: none

Organizational Status of Donee: 501 (c) (3) Amount Given:

Class of Activity: General programs

Donee's Name: United States Olympic Committee Donee's Address:

Colorado Springs, CO 80909

Relationship of Donee: none Organizational Status of Donee: 501 (c) (3)

Amount Given: 20.

Class of Activity: General programs

Donee's Name: Sierra Club Donee's Address: 85 Second St 2nd Fl

San Francisco, CA 94105

Relationship of Donee: none Organizational Status of Donee:

501 (c) (3) 19. Amount Given:

Class of Activity:

General programs Yeshiva Tiferes Yisroel Donee's Name:

Donee's Address: 1271 E 35th St Brooklyn, NY 11210

Relationship of Donee: none

Organizational Status of Donee: 501 (c) (3) Amount Given: 72.

Class of Activity: General programs

Donee's Name: Rails to Trails Conservancy 2121 Ward Ct NW 5th Fl Donee's Address:

Washington, DC 20037 none

Relationship of Donee:

Organizational Status of Donee: 501 (c) (3) Amount Given: 18.

Class of Activity: General programs Mechon Hadar Donee's Name: Donee's Address:

25 Broadway Ste 1700 New York, NY 10004

Relationship of Donee: none Organizational Status of Donee: 501 (c) (3)

1,000. Amount Given:

Class of Activity: General programs

Donee's Name: Darkei Noam Scholarship Fund

Donee's Address: 2822 Avenue J Brooklyn, NY 11210

Relationship of Donee: Organizational Status of Donee: none

501(c)(3) Amount Given:

Class of Activity: General programs
B'nai Israel Congregation

Donee's Name: Donee's Address: 6301 Montrose Rd 2009

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The M. B. Lewis Charitable Foundation

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1,425.

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Statement 4 (continued) Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

Class of Activity:

Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

Class of Activity:

Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

Class of Activity:

Donee's Name:

Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

Rockville, MD 20852

none

501 (c) (3)

General programs Ohev Sholom Schul

1600 Jonquil Ave NW Washington, DC 20012

501 (c) (3)

General programs
Israel Children's Cancer Foundation Inc

141 Washington Ave Ste 205

awrence, NY 11559

none

501 (c) (3)

General programs Yeshiva University

500 West 185th Street New York, NY 10033

none

501 (c) (3)

1,000.

General programs

Hebrew Home of Greater Washington

6121 Montrose Rd Rockville, MD 20852

none

501 (c) (3)

100.

8,022.

Total 🕏

009	Federal Supporting Deta	il Page
	The M. B. Lewis Charitable Foundate	tion 52-155777
Other Income Producing A Interest on savings & cash	ctivities investments	
Schwab / 5789-0712 / S		\$ 0. 0. 0. 0. \$ 0.
Other Income Producing A Dividends/interest from sec	ctivities curities.	
Schwab / 5789-0712		Total \$ 3,325.
Net Investment Income / Ac Capital gain net income (se	dj. Net Income ee Screen 24) [O]	
Schwab / 5789-0712		Total \$ 18. \$ 18.