Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

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

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return
[ ] Amended return [ ] Address change [ ] Name change

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

Name of foundation
The Phyllis and Robert E.
Levinson Foundation, Inc.

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
2915 S Federal Hwy Ste D2

City or town, state, and ZIP code
Delray Beach, FL 33483-3288

A Employer identification number
65-0802364

B Telephone number
(561)243-2690

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: [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 35,413.

J Accounting method: [X] 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).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	2,092.	2,092.		Statement 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<9,441.>			
	b Gross sales price for all assets on line 6a 41,793.				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total** Add lines 1 through 11	<7,349.>	2,092.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees Stmt 2	175.	175.		0.
	b Accounting fees Stmt 3	775.	775.		0.
	c Other professional fees Stmt 4	94.	94.		0.
	17 Interest				
	18 Taxes Stmt 5	75.	75.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	1,119.	1,119.		0.
	25 Contributions, gifts, grants paid	36,700.			36,700.
	26 **Total expenses and disbursements** Add lines 24 and 25	37,819.	1,119.		36,700.
	27 Subtract line 26 from line 12:				
	a *Excess of revenue over expenses and disbursements*	<45,168.>			
	b **Net investment income** (if negative, enter -0-)		973.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	7,737.	4,334.	4,334.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock Stmt 6	70,993.	29,228.	31,079.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	78,730.	33,562.	35,413.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	78,730.	33,562.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 **Total net assets or fund balances**	78,730.	33,562.	
	31 **Total liabilities and net assets/fund balances**	78,730.	33,562.	

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	78,730.
2	Enter amount from Part I, line 27a	2	<45,168.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	33,562.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	33,562.

Part IV · Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	Gain adjustment	P	Various	Various
b	Northern Trust 6225- see attached	P	Various	Various
c	Northern Trust 6225- see attached	P	Various	Various
d	Capital Gains Dividends			
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	10.			10.
b	14,947.		15,885.	<938.>
c	26,803.		35,349.	<8,546.>
d	33.			33.
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				10.
b				<938.>
c				<8,546.>
d				33.
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	<9,441.>
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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 instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	42,450.	115,619.	.367154
2007	52,066.	174,917.	.297661
2006	48,150.	165,515.	.290910
2005	44,075.	147,704.	.298401
2004	48,758.	220,373.	.221252

2	**Total** of line 1, column (d)	2	1.475378
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	.295076
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	54,122.
5	Multiply line 4 by line 3	5	15,970.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	10.
7	Add lines 5 and 6	7	15,980.
8	Enter qualifying distributions from Part XII, line 4	8	36,700.

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 instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	10.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	10.
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	10.
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a		
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	0.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	10.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 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? *If "Yes," attach a detailed description of the activities.*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV.*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ FL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses Stmt 7	10	X	

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ Jon R. Levinson Telephone no. ▶561-243-2690

Located at ▶2915 S Federal Hwy Ste D2; Delray Beach, FL ZIP+4 ▶33483-3288

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	N/A	1b		
	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?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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.)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b		X

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

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

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

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

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

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ 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)? N/A | 5b |

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X (No)

If "Yes" to 6b, file Form 8870

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

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

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.

(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
Robert E. Levinson 5262 Boca Marina Circle South Boca Raton, FL 334875247	President 0.00	0.	0.	0.
Jon R. Levinson 2615 s Federal Highway Delray Beach, FL 33483	Secretary-Treasurer 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. 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

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.

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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	48,910.
b	Average of monthly cash balances		1b	6,036.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	54,946.
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	54,946.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	824.
5	**Net value of noncharitable-use assets**. Subtract line 4 from line 3. Enter here and on Part V, line 4		5	54,122.
6	**Minimum investment return**. Enter 5% of line 5		6	2,706.

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	2,706.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 10.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	10.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	2,696.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	2,696.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	2,696.

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	36,700.
b	Program-related investments - total from Part IX-B	1b	0.
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	36,700.
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	5	10.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	36,690.

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.

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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				2,696.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years: ____, ____, ____		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004 — 38,378.				
b From 2005 — 36,974.				
c From 2006 — 40,313.				
d From 2007 — 43,564.				
e From 2008 — 36,683.				
f **Total** of lines 3a through e	195,912.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 36,700.				
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				2,696.
e Remaining amount distributed out of corpus	34,004.			
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	229,916.			
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 instr.			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)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	38,378.			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	191,538.			
10 Analysis of line 9:				
a Excess from 2005 — 36,974.				
b Excess from 2006 — 40,313.				
c Excess from 2007 — 43,564.				
d Excess from 2008 — 36,683.				
e Excess from 2009 — 34,004.				

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			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

None

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

None

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

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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 8

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Schedule attached	None	501(c)(3)	unrestricted donations	36,700.
Total			▶ 3a	36,700.
b *Approved for future payment*				
None				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
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					
4 Dividends and interest from securities					2,092.
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					<9,441.>
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)		0.		0.	<7,349.>

13 Total. Add line 12, columns (b), (d), and (e) 13 <7,349.>

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
	For the purpose of making qualified contributions.

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

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

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

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

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

▶ TREASURER 3/8/10 ▶ TREASURER

Signature of officer or trustee — Date — Title

Paid Preparer's Use Only

Preparer's signature ▶ R. Keith Walton, CPA/PFS	Date 03/02/10	Check if self-employed ▶ ☐	Preparer's identifying number
Firm's name (or yours if self-employed), address, and ZIP code ▶ Walton & Company CPAs PL, 2101 Northwest Second Avenue, Suite 5, Boca Raton, FL 33431-7498		EIN ▶	
		Phone no. 561- 395-6653	

923622
02-02-10

Schedule B
(Form 990,.990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization
The Phyllis and Robert E.
Levinson Foundation, Inc.

Employer identification number
65-0802364

Organization type (check one).

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions.

General Rule

☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of $5,000 or more during the year. ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization	Employer identification number
The Phyllis and Robert E. Levinson Foundation, Inc.	65-0802364

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Robert E. Levinson 5262 Boca Marina Circle South Boca Raton, FL 334875247	$	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

2009 Tax Information Statement

Account Number: 23-36225
Recipient's Tax ID number: XX-XXX2364

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
THE PHYLLIS AND ROBERT E
2915 S FEDERAL HWY STE D2
DELRAY BEACH , FL 33483-3288

NORTHERN TRUST, NA
P.O. BOX 803878
CHICAGO, IL 60680

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
20 0000	22160K105	COSTCO WHSL CORP NEW	03/07/2008	01/21/2009	949.39	1,215.40	-266 01	0 00
5 0000	002824100	ABBOTT LABORATORIES	06/12/2008	03/09/2009	230 80	269.00	-38.20	0.00
10 0000	009158106	AIR PRODUCTS & CHEMICALS INC	06/12/2008	03/09/2009	456 50	1,011.90	-555 40	0.00
111 3500	665162723	MFB NORTHN FDS SMALL CAP INDEX FD	VARIOUS	03/09/2009	417.56	966.43	-548 87	0.00
364 8300	665162533	MFB NORTHERN FUNDS BD INDEX FD	11/20/2008	05/12/2009	3,714.00	3,578.99	135.01	0 00
16.2500	922031869	MFO VANGUARD FXD INC SECS FD INC INFLATION-PROTECTED SECS FD #119	04/29/2009	05/13/2009	195.00	194.67	0.33	0.00
731.4400	665162533	MFB NORTHERN FUNDS BD INDEX FD	11/20/2008	07/29/2009	7,468.00	7,175.43	292.57	0 00
122 4000	922031869	MFO VANGUARD FXD INC SECS FD INC INFLATION-PROTECTED SECS FD #119	04/29/2009	08/25/2009	1,507 94	1,466.33	41.61	[illegible]
.7200	665162806	MFB NORTHERN FDS FIXED INCOME FD	11/06/2009	11/06/2009	7.32	7.24	0 08	0 00
Total Short Term Sales					14,946.51	15,885.39	-938.88	0 00
Long Term 15% Sales								
5 0000	071813109	BAXTER INTL INC	11/10/2006	01/21/2009	276.75	226.47	50.28	0.00
5 0000	075887109	BECTON DICKINSON & CO	07/25/2006	01/21/2009	358 80	313.53	45.27	0 00
5 0000	478160104	JOHNSON & JOHNSON	08/04/2006	01/21/2009	280.30	317 70	-37 40	0 00
5.0000	58405U102	MEDCO HEALTH SOLUTIONS INC	07/19/2007	01/21/2009	212.15	203 56	8 59	0 00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Account Number: 23-36225
Recipient's Tax ID number: XX-XXX2364

☐ Corrected ☐ 2nd TIN notice

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THE PHYLLIS AND ROBERT E
2915 S FEDERAL HWY STE D2
DELRAY BEACH , FL 33483-3288

NORTHERN TRUST, NA
P.O. BOX 803878
CHICAGO, IL 60680

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax With
15.0000	001055102	AFLAC INC	VARIOUS	03/09/2009	172.80	920.61	-747.81	0.00
20.0000	002824100	ABBOTT LABORATORIES	08/03/2006	03/09/2009	923 19	945.63	-22 44	0.00
15 0000	00724F101	ADOBE SYS INC	11/08/2006	03/09/2009	252 45	600.06	-347 61	0 00
10.0000	037833100	APPLE COMPUTER INC	VARIOUS	03/09/2009	831.10	825 16	5 94	0 00
10 0000	071813109	BAXTER INTL INC	VARIOUS	03/09/2009	505 20	515.12	-9 92	0 00
10.0000	075887109	BECTON DICKINSON & CO	07/25/2006	03/09/2009	621 80	627.05	-5 25	0 00
15 0000	166764100	CHEVRONTEXACO CORP	07/05/2006	03/09/2009	871.80	954.61	-82.81	0 00
30 0000	17275R102	CISCO SYS INC	02/02/2006	03/09/2009	412 80	552 32	-139 52	0 00
10 0000	235851102	DANAHER CORP	VARIOUS	03/09/2009	479 80	675 83	-196 03	0 00
15 0000	30161N101	EXELON CORP	VARIOUS	03/09/2009	659 40	1,251.88	-592.48	0 00
30 0000	369604103	GENERAL ELECTRIC CO	VARIOUS	03/09/2009	224.40	1,057.79	-833 39	0 00
15 0000	428236103	HEWLETT PACKARD CO COM	08/23/2006	03/09/2009	383.85	527 00	-143 15	)
15.0000	450911102	ITT INDS INC	01/26/2007	03/09/2009	483.45	876 56	-393 11	0 00
15.0000	478160104	JOHNSON & JOHNSON	VARIOUS	03/09/2009	695.55	938 89	-243 34	0 00
20 0000	487836108	KELLOGG CO	06/12/2006	03/09/2009	729.60	942.80	-213 20	0.00
15 0000	580135101	MCDONALDS CORP	01/26/2007	03/09/2009	781.05	646 09	134 96	0.00
20.0000	58405U102	MEDCO HEALTH SOLUTIONS INC	08/17/2007	03/09/2009	745.80	814.22	-68 42	0 00
25.0000	594918104	MICROSOFT CORP COM	11/09/2006	03/09/2009	378.25	731 00	-352.75	0 00
15.0000	595635103	MFC MIDCAP SPDR TR UNIT SER 1 STD & POORS	VARIOUS	03/09/2009	1,109.84	1,940 40	-830.56	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Account Number: 23-36225
Recipient's Tax ID number: XX-XXX2364

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
THE PHYLLIS AND ROBERT E
2915 S FEDERAL HWY STE D2
DELRAY BEACH , FL 33483-3288

NORTHERN TRUST, NA
P O. BOX 803878
CHICAGO, IL 60680

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income T. Withheld
15 0000	637071101	NATIONAL-OILWELL INC	03/07/2008	03/09/2009	391 65	921.30	-529 65	0 00
30 0000	68389X105	ORACLE CORPORATION	VARIOUS	03/09/2009	418.50	562 25	-143 75	0.00
25.0000	713448108	PEPSICO INC	11/02/2005	03/09/2009	1,153 49	1,475 83	-322 34	0 00
30 0000	742718109	PROCTER & GAMBLE CO	04/30/2007	03/09/2009	1,335.29	1,942.50	-607 21	0.00
10.0000	806857108	SCHLUMBERGER LTD ISIN #AN8068571086	11/22/2006	03/09/2009	375 80	644.44	-268 64	0 00
10.0000	913017109	UNITED TECHNOLOGIES CORP	07/23/2004	03/09/2009	376 70	464.27	-87.57	0.00
25.0000	92343V104	VERIZON COMMUNICATIONS	VARIOUS	03/09/2009	653.50	963.51	-310 01	0 00
10 0000	941848103	WATERS CORP	VARIOUS	03/09/2009	316 55	601.89	-285 34	0 00
25.0000	949746101	WELLS FARGO & CO NEW	VARIOUS	03/09/2009	248 25	840 50	-592.25	0.00
20.0000	G1150G111	ACCENTURE LTD BERMUDA CL A	10/25/2006	03/09/2009	542 00	644.57	-102.57	0 00
5.0000	H8817H100	TRANSOCEAN LTD	07/18/2007	03/09/2009	253 75	536.34	-282.59	0
169.6000	665162699	MFB NORTHN HI YIELD FXD INC FD	02/08/2007	05/12/2009	1,060 00	1,400.89	-340 89	0 00
85.1100	665162806	MFB NORTHERN FDS FIXED INCOME FD	08/30/2007	05/12/2009	840 00	822.16	17 84	0 00
633 9700	665162806	MFB NORTHERN FDS FIXED INCOME FD	08/30/2007	11/06/2009	6,447 45	6,124.13	323 32	0 00
Total Long Term 15% Sales					26,803.06	35,348.86	-8,545.80	0 00

This is important tax information and is being furnished to you.

Contributions Made - Last year:2

1/1/2009 through 12/31/2009

Date	Num	Description	Memo	Amount
1/12/2009	1497	Rockdale Temple	Memory Dotty Senior	-100 00
2/25/2009	1499	Rochester Institute Of Technology	Annual fund	-500.00
3/5/2009	1501	Hospice By The Sea	Memory of Gismondi, Rush, Gill	-100.00
4/3/2009	1502	Cedar Village		-300 00
4/7/2009	1503	United Way of Palm Beach County	Memory Chad Petrolia	-50.00
4/7/2009	1504	United Way of Palm Beach County	Alexis de Toqueville Society	-12,000 00
4/16/2009	1505	Foundation Fighting Blindness		-100 00
4/16/2009	1506	WPBT Channel 2		-100.00
5/1/2009	1508	Smithsonian Institution		-75.00
5/12/2009	1509	Jewish Federation of South PB County		-1,000 00
5/12/2009	1510	Foundation Fighting Blindness	3rd pmt of 5	-6,000.00
6/4/2009	1512	United Way Of Broward County	Memory David Grabowski	-25 00
6/26/2009	1513	Foundation Fighting Blindness	Memory Schwarm and Betty Danto	-100.00
7/29/2009	1514	Florida Atlantic University Foundation, Inc	Keeping Memories Alive Caring Hearts	-1,000 00
7/29/2009	1515	Boca Raton Community Hospital Foundation	First 5k on 50k pledge	-5,000.00
8/17/2009	1516	Valley Temple	3rd of 4 payments	-2,500.00
9/18/2009	1517	Hospice By The Sea	Memory PGL	-1,000 00
11/4/2009	1518	Spirit Of Giving Campaign	Junior League Boca/Delray	-1,000.00
11/6/2009	1519	Lynn University	Performing Arts Center	-5,000.00
12/16/2009	1520	Low Vision Information Center		-500.00
12/16/2009	1521	Walnut Hills High School		-250 00
1/1/2009 - 12/31/2009				**-36,700.00**

TOTAL INFLOWS	**0.00**
TOTAL OUTFLOWS	**-36,700.00**
NET TOTAL	**-36,700.00**

Form 990-PF Dividends and Interest from Securities Statement 1

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
Northern Trust Bank as nominee	2,125.	33.	2,092.
Total to Fm 990-PF, Part I, ln 4	2,125.	33.	2,092.

Form 990-PF Legal Fees Statement 2

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Legal	175.	175.		0.
To Fm 990-PF, Pg 1, ln 16a	175.	175.		0.

Form 990-PF Accounting Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting	775.	775.		0.
To Form 990-PF, Pg 1, ln 16b	775.	775.		0.

Form 990-PF Other Professional Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Other operating expenses	94.	94.		0.
To Form 990-PF, Pg 1, ln 16c	94.	94.		0.

Form 990-PF | Taxes | Statement 5

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Other Taxes	75.	75.		0.
To Form 990-PF, Pg 1, ln 18	75.	75.		0.

Form 990-PF | Corporate Stock | Statement 6

Description	Book Value	Fair Market Value
Northern Trust Bank as nominee	29,228.	31,079.
Total to Form 990-PF, Part II, line 10b	29,228.	31,079.

Form 990-PF | List of Substantial Contributors Part VII-A, Line 10 | Statement 7

Name of Contributor	Address
Robert E. Levinson	Boca Raton, FL

Form 990-PF Grant Application Submission Information Statement 8
Part XV, Lines 2a through 2d

Name and Address of Person to Whom Applications Should be Submitted

Robert E. Levinson; 5262 Boca Marina Circle South; Boca Raton, FL 33487

Telephone Number

Form and Content of Applications

Application should be submitted on organization's letterhead indicating the purpose of the rquest and proof that the organization is exempt from federal taxation under IRS Code Section 501(c)(3).

Any Submission Deadlines

None

Restrictions and Limitations on Awards

None