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Form 990-PF

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

OMB No 1545-0052

2009

Treated às à Private Foundation 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 , 2009, and ending 6/01 5/31 2010 For calendar year 2009, or tax year beginning Initial Return of a former public charity Final return G Check all that apply Initial return Name change Amended return Address change Employer identification number Use the Max and Anna Levinson Foundation IRS label 23-6282844 Otherwise. PO Box 6309 В Telephone number (see the instructions) print Santa Fe, NM 87502-6309 (505) 986-8608 or type. If exemption application is pending, check here See Specific C Instructions. 1 Foreign organizations, check here 2 Foreign organizations meeting the 85% test, check Check type of organization. X Section 501(c)(3) exempt private foundation here and attach computation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation If private foundation status was terminated J Accounting method | Cash Fair market value of all assets at end of year under section 507(b)(1)(A), check here (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination 13,875,891 (Part I, column (d) must be on cash basis) under section 507(b)(1)(B), check here Part I Analysis of Revenue and (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net Expenses (The total of amounts in for charitable expenses per books income income columns (b), (c), and (d) may not neces sarily equal the amounts in column (a) purposes (cash basis only) (see the instructions).) Contributions, gifts, grants, etc, received (att sch) Ck ► X if the foundn is **not** req to att Sch B 2 Interest on savings and temporary N/A cash investments 349,029 Dividends and interest from securities 349,029 5a Gross rents. 44.0 **b** Net rental income or (loss) 54,468. வி Ж, , 6a Net gain/(loss) from sale of assets not on line 10 REVENUE 3300 A. 4.2 b Gross sales price for all assets on line 6a 1417 July 1946 3,666,529 Capital gain net income (from Part IV, line 2). $\overline{54,468}$ Net short-term capital gain 33.3 Income modifications Sec. 28 10a Gross sales less returns and allowances. * 4 Pe 14 **b** Less Cost of goods sold å c Gross profit/(loss) (att sch) % 30 11 Other income (attach schedule) 12 Total. Add lines 1 through 11 403,497 403,497 ,000 117,000 13 Compensation of officers, directors, trustees, etc RECEIVED 10,833. 10,833. 14 Other employee salaries and wages 15 Pension plans, employee benefits 10 260 260. 16a Legal fees (attach schedule) See St 1 MAR 0 8 2011 8,149. **b** Accounting fees (attach sch) See St 2 8,149. c Other prof fees (attach sch) œ OGDEN 17 Interest 117 16,563 18. 563 See Stm 3 18 Taxes (attach schedule)(see instr.) 19 Depreciation (attach sch) and depletion Occupancy Travel, conferences, and meetings 2,250 2,250. 21 Printing and publications 22 EXPE Other expenses (attach schedule) 105,307 7,258 See Statement 4 98,049. Total operating and administrative 24 236,955 260,362 15,407 expenses. Add lines 13 through 23 Contributions, gifts, grants paid Part XV 275,000 275,000 25 ** Total expenses and disbursements. 535,362 15,407 511 , 955 Add lines 24 and 25 Ŋ: Subtract line 26 from line 12: a Excess of revenue over expenses -131,865 and disbursements 388,090

< 6 & &

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

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 12,569,184.
2 Enter amount from Part I, line 27a
2 -131,865.
3 Other increases not included in line 2 (itemize)
4 Add lines 1, 2, and 3
5 Decreases not included in line 2 (itemize)
5 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30
6 12,437,319.

Par		the kind(s) of property sold (e.g., re; or common stock, 200 shares ML		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a	See attached stateme	ent 10	-	P	Various	Various
	See attached stateme	P	Various	Various		
					1022900	
d						
e						
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basi plus expense of sale		(h) Gain or (e) plus (f) m	(loss) inus (g)
a	1,331,433.		1,344	,784.		-13,351.
ь			2,267			67,819.
d					<u> </u>	
е	-					
<u>`</u>		ng gain in column (h) and owned by	the foundation on 12/31/69		(I) Gains (Col	umn (h)
	(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 an		gain minus column (l than -0-) or Losses (fi	<), but not less
a						-13,351.
b						67,819.
e						
	Capital gain net income or (net	capital loss) — If gain, also If (loss), ent	enter in Part I, line 7 er -0- in Part I, line 7	2	T	54,468.
3	Net short-term capital dain or (loss) as defined in sections 1222(5)				34,400.
3		,	· · · · · · · · · · · · · · · · · · ·			
		8, column (c) (see the instructions)	If (loss), enter -0-	3		-13,351.
D	in Part I, line 8	Section 4940(e) for Reduce	d Tay on Not Investme			-13,331.
If 'Ye	es,' the foundation does not quali	tion 4942 tax on the distributable arr fy under section 4940(e) Do not co	mplete this part		Yes	X No
_1		n each column for each year, see th		any entries		
	(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use ass	ets (co	(d) Distribution Dlumn (b) divided	
	2008	569,208.	13,273	3,067.		0.042884
	2007	1,204,802.	16,189		·	0.074419
	2006	2,189,500.	16,365			0.133789
	2005	1,061,607.	17,092			0.062111
	2004	1,220,705.	17,228			0.070853
2	Total of line 1, column (d)			2		0.384056
3		e 5-year base period — divide the to has been in existence if less than 5		3		0.076811
4	Enter the net value of nonchari	table-use assets for 2009 from Part	X, line 5	4	1	3,109,282.
5	Multiply line 4 by line 3			_ 5		1,006,937.
6	Enter 1% of net investment inco	ome (1% of Part I, line 27b)		6		3,881.
7	Add lines 5 and 6			7		1,010,818.
8	Enter qualifying distributions from	om Part XII, line 4		8		511,955.
	If line 8 is equal to or greater th	an line 7, check the boy in Part VI	line 1h, and complete that r	art ucing a 1	% tax rate. See t	ho

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(b), 0 4948 - see the instructions) 1		990-PF (2009) Max and Anna Levinson Foundation 23-6282844		P	age 4
bille of ruling of determination letter bill conditions that meet the section 4940(e) requirements in Part V., check here in and enter 1% of Part I, Inne 27b c All other domestic foundations enter 2% of the 27b Exerty foreign organizations enter 4% of Part I, Inne 12, column (b) c All other domestic foundations enter 2% of the 27b Exerty foreign organizations enter 4% of Part I, Inne 12, column (b) c Tax based escention \$11 (domestic section 4947(a)(1) trusts and taxabile foundations only Others enter -0.) d Add lines 1 and 2 d Subtitle A (nocome) tax (domestic section 4947(a)(1) trusts and taxabile foundations only Others enter -0.) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Tax based with application for selamously withheld 6 Backup withholding erroneously withheld 7 Total credits and payments Add lines 5 and 8 is note that line 4 from line 5 in 66 in 66 in 7 and 66 in 66	Part	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see the instruc	tions)		
b Domeste foundations that meet the section 4940(e) requirements in Part V, check here	1 a			*	* 3
check here. Pand enter 1% of Part I, Inne 27b c All other demosic foundations enter 3% of sine 27b Eventy freign arganizations enter 4% of Part I, Inne 12, column (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0.) 3 Add lines 1 and 2 4 Subtitle A (nocome) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0.) 5 Tax based on investment income. Subtract line 4 from time 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from time 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from time 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from time 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from time 3 if zero or less, enter -0. 5 Tax based on investment income. Subtract line 4 from time 3 if zero or less, enter -0. 5 Tax based with application for extension of time to file (Form 8868) 6 Subtract line 4 from time 5 if zero in the file (Form 8868) 6 Subtract line 5 if zero in the file 6 from 8868) 6 Subtract line 1 from				7 -	
c All other demestic foundations enter 2% of the 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.) 3 Add lines 1 and 2 4 Subtitle A (norome) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0.) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 5 Credits 7/gments a 200 settinated tax pints and 2008 consumption of credited to 200 6 Exempt foreign organizations -1 tax withheld at source 6 Each	þ			<u>/,/</u>	62.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable toundations only Others enter -0.) 3 Add ines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0.) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 6 Credits/Payments a 2099 eshibated tay ants and 2009 everpayment credited to 2009 b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6 at though 6d 8 Enter any penalty for underpayment of estimated tax. Check here: If if Form 2220 is attached 8 2.5. 9 Tax due. If the total of hiers 5 and 8 is more than line 7, enter amount ower and 10 overpayment, time 12 is more time the total of lines 5 and 8, enter the amount ower and 10 overpayment, time 12 is more time the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to the Credited to 2010 estimated tax. Part XIII-A Statements Regarding Activities 1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or infervience in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or infervience in any political campaign? 1b Did it spend more than 5100 during the year (either directly or indirectly) for political puriposes (see the instructions for definition). 3 If the answer is 'Ves' to Iar of IA, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in commercion with the activities. 1 Did it spend more than 5100 during the year (10) on the foundation in the power in 1129-PGL for this year? 2 Enter the reimbursement (if any) paid by the foundation during the year (10) on the foundation of the activities. 3 Has the foundation on			ş ~ »'		, ,
foundations only. Others enter -0-) 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-) 6 Credits/Payments a 200 estimated tax prints and 2008 overpayment credited to 2009 be Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8858) 6 Beauty withholding erroreously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here	¢	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)	· · ·	V 3 /	- "
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5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0. 6 Credits/Payments a 2099 estimated tax mits and 2008 overpayment credited to 2009 b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments Add lines 6 at through 6d 8 Enter any penalty for underpayment of estimated tax. Check here	4			','	
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b Exempt foreign organizations — tax withheld at source c Tax pard with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld d Total credits and payments. Add lines 6a through 6d 8. Enter any penalty for underpayment of estimated tax. Check here from 2220 is attached 8. 25. 9. Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10. Overpayment. If line 7 is more than line total of lines 5 and 8, enter the amount overpaid 11. Enter the amount of line 10 to be Credited to 2019 estimated tax. 12.13. Refunded 11. On. Part VIII-A: Statements Regarding Activities 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? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for defunition)? If the answer is "Yes" to Ta 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 1b. X If the answer is "Yes" to Ta 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 1b. X If the answer is "Yes" to Ta or 1b, attach a detailed description of the activities or distributed by the foundation in accommendation of the activities or line foundation managers 1c. X 4 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year 1c. X 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 3 Has the foundation managers 3 Has the foundation managers 5 O. 2 Has the foundation of the activities of the activities of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4 Did the foundatio	_	- I I I I I I I I I I I I I I I I I I I	CE WITH	3 ;	1:1
c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withhold 7 Total credits and payments Add lines 6a through 6d 8 Enter any penatry for underpayment of estimated tax. Check here			N OF		4 3
d Backup withholding erroneously withheld 7 Total credits and payments Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here X if Form 2220 is attached 8 Enter any penalty for underpayment of estimated tax Check here X if Form 2220 is attached 9 7 8,000. 9 7 at due, if the total of lines 5 and 8 is more than line 7, enter amount ower 10 Oversyment. 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 12 13. Refunded 11		The state of the		,	21
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8 Enter any penalty for underpayment of estimated tax. Check here	d	Backup withholding erroneously withheld			7 mm
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount overpad 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpad 11 Enter the amount of line 10 be "Credited to 2010 estimated tax" 213. Refunded 11 0.2 Part VII-A. Statements Regarding Activities 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? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 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 and copies of any materials published or distributed by the foundation in connection with the activities c Did the foundation of Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation = S O (2) On foundation managers \$ 0. 2 Has the foundation of Form 190-POL for this year? 3 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 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4b If "Yes," attach the statement required by General Instruction 7 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either Byl state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state leav remain in the governing instrument so that no mandatory directions that confl	7	Total credits and payments Add lines 6a through 6d		8,0	
10 Overpayment. If line? is more than the total of lines 5 and 8, enter the amount overpaid 11 Either the amount of line 10 to be Credited to 2010 estimated tax 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 0. 213. Refunded 11 1. 213. Refunded 11 1. 213. Refunded 11 1. 214. Refunded 11 1. 215. Refunded 11 1. 216. Refunded 11 1. 217. Refunded 11 1. 218. Refunded 11 1. 218. Refunded 11 1. 219. Refunded 11 1. 213. Refunded 11 1. 21 2. Refunded 12 1. Refunded	8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached.			25.
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Part MII-A Statements Regarding Activities 1a During the tax year, did the foundation altempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? b Drid it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 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? 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 ioundation managers 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes, 'attach a detailed description of the activities 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 4 Did 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 4 Did the foundation, dissolution, or substantial confraction during the year? 5 Was there a liquidation, termination, dissolution, or substantial confraction of the year? 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • 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 in the governing instrument? 7 Did the foundation have at least \$5,000 in assets at any ti	10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		2	13.
Part VII-A Statements Regarding Activities 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 campaing? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 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? 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. □ 1 € Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ↑ 0. □ 1 € Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ↑ 0. □ 1 € 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 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 4 a Did the foundation, because a gross sincome of \$1,000 or more during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section \$508(e) (relating to sections 4941 through 4945) satisfied either • By state legislation that effectively amends the governing instrument so that no manadatory directions that conflict with the state law remain in the governing instrument in the	11	Enter the amount of line 10 to be: Credited to 2010 estimated tax			0.
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? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? If the answer is "Yes" to Ta 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? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$\frac{5}{2}\$ 0. (2) On foundation managers \$\frac{5}{2}\$ 0. e Enter the remibursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$\frac{5}{2}\$ 0. (2) On foundation managers \$\frac{5}{2}\$ 0. 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 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? bif "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year? 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 so that no mandatory directions that conflict with the state law remain in the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument is registered (see the instructions) NM bif the answer is "Yes," to line 7, has the foundation furni	Parl	VII-A Statements Regarding Activities			
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? 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? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation	1 a			Yes	
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and addresses.		for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part XIV	9		<u>X</u>
	10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names	120		v
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	m 990-PF (2009) Max and Anna Levinson Foundation	23-628284	4	Pa	age 5
Par	rt 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
12	Did the foundation comply with the public inspection requirements for its annual returns and exemption	n application?	13	Х	
	Website address ► Levinsonfoundation.org	- ,- ,	لتتا		
14		no • (505)	995-	8802	
1-4	Located at ► PO Box 6309 Santa Fe NM ZIP + 4 ►	87502		2 2 2 2	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here		\bar{N}/\bar{A}		<u> </u>
13	and enter the amount of tax-exempt interest received or accrued during the year	▶ 15	24/41		□ N/A
Da.	it VII-B Statements Regarding Activities for Which Form 4720 May Be Required				21/ 21
rai	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		14 44	Yes	No
_	•		1 /	162	110
1	a During the year did the foundation (either directly)	□v ⊽n.		** 74	, , %
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No	*	* *	,,
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a				, , '
	disqualified person?	Yes X No	12	• • , ,	
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No	92	. 3	. *
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	X Yes No		1.77	
	(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	7	1 34	
	con a la la company de la comp		4.		
	(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				٠ .
	of government service, if terminating within 90 days)	Yes X No		* *	Ì
	b If any answer is 'Yes' to 1a/1)-(6), did any of the acts fail to qualify under the exceptions described in			* 3	
	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	ons)?	1 b		X
	Organizations relying on a current notice regarding disaster assistance check here	▶ 🗌	100	*	, 1
	c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts,	_	* 3	<u> </u>	>> >>
	that were not corrected before the first day of the tax year beginning in 2009?		1 c		X
2	Tayon on failure to distribute income (costion 1912) (does not apply for years the foundation was a		7	28.1 %	***
2	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))		W	100	
	• • • •		**	1 2	5.0
	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 , 20 _			,	**
]	* ;
	b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942	2(a)(2) (a)(2) to			. !
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 all years listed, answer 'No' and attach statement — see the instructions)	رمارکا ال	2b	N	Ã.
	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years	here	/ X	123	3 8
	► 20 , 20 _ , 20 _ , 20		4 3 8 A		*
				р. Р.	*
3	3a 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		1	
			* %	3 , ,	
	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 large of the 5-year period (or longer period approve	24 1	4	* * * **	
	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				5 e
	(3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)		3 b	N	/A
			1 30	111	41
4	4a Did the foundation invest during the year any amount in a manner that would jeopardize its		A-		v
	charitable purposes?		4a	* /	X
	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could		,	%i, :	
	reopardize its charitable purpose that had not been removed from reopardy before the first day of				
	the tax year beginning in 2009?		4b	ı	X

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Form **990-PF** (2009)

Form 990-PF (2009) Max and Anna Levin			23-6	282844	Page
Part VII-B Statements Regarding Activit		<u>n 4720 May Be Req</u>	uired (continued))	
5a During the year did the foundation pay or incu	•			_	
(1) Carry on propaganda, or otherwise attemp	·		∐ Yes ∑	X No	*# ·
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	ation drive?		Yes	X No	
(3) Provide a grant to an individual for travel,			∐ Yes [ː	X] No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	4940(d)(2)? (see instr	uctions)	Yes	X No ;	ķ. \$
(5) Provide for any purpose other than religio educational purposes, or for the preventio	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes	X No	. *
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regar	qualify under the excep ding disaster assistance	tions		N/A
Organizations relying on a current notice rega	rding disaster assistan	ce check here	▶ []]	IN/A
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respondif 'Yes,' attach the statement required by Region 1.	sibility for the grant?		N/A Yes [□ No	
6a Did the foundation, during the year, receive ar on a personal benefit contract?	ny funds, directly or ind	lirectly, to pay premium:	S Yes	X No	
b Did the foundation, during the year, pay premi	iums, directly or indirec	ctly, on a personal bene	fit contract?	6Ь	X
7a At any time during the tax year, was the found	-			X No	5)
b If yes, did the foundation receive any proceed	s or have any net incor	me attributable to the tra	ansaction?	7b	N/A
Part VIII Information About Officers, Dand Contractors	irectors, Trustees,	Foundation Manag	gers, Highly Paid	Employee	s,
1 List all officers, directors, trustees, foundation	n managers and their	compensation (see inst	ructions)		
	(b) Title and average	(c) Compensation	(d) Contributions to		se account,
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred		owances
See Statement 9			compensation		
		102,000.	15,000		0.
2 Compensation of five highest-paid employee	s (other than those inc	cluded on line 1— see in	structions). 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	other all	se account, owances
None					
				ļ	
Total number of other employees paid over \$50,000				<u> </u>	
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Form 990-PF (2009) Max and Anna Levinson Foundation 23-6 Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid	282844 Page 7
and Contractors (continued)	
3 Five highest-paid independent contractors for professional services — (see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	
Total number of others receiving over \$50,000 for professional services.	> 0
Part IX-A Summary of Direct Charitable Activities	
	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	_
	_
2	
	_
3	-
	-
4	_
	-
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 <u>N/A</u>	_
2	
All other program-related investments See instructions	
3	_
Total. Add lines 1 through 3	• 0.
BAA	Form 990-PF (2009)

Par 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. 1a a Average monthly fair market value of securities 13,144,739. 1 b 103,520. **b** Average of monthly cash balances c Fair market value of all other assets (see instructions) 1 c 60,657. d Total (add lines 1a, b, and c) 1 d 13,308,916. e Reduction claimed for blockage or other factors reported on lines 1a and 1c 0. 1 e (attach detailed explanation) 2 Acquisition indebtedness applicable to line 1 assets 2 0 13,308,916. 3 Subtract line 2 from line 1d 3 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions) 4 199,634. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4. 5 13,109,282. Minimum investment return. Enter 5% of line 5 6 655,464. 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.) 655,464. Minimum investment return from Part X, line 6 2a Tax on investment income for 2009 from Part VI, line 5 7,762 2a 첉 b Income tax for 2009 (This does not include the tax from Part VI) 2b c Add lines 2a and 2b 2c 7,762. 3 702. 3 Distributable amount before adjustments Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 4 5 5 Add lines 3 and 4 Deduction from distributable amount (see instructions) 6 6 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 702 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes a Expenses, contributions, gifts, etc - total from Part I, column (d), line 26. 511,955. 1 a **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 9 9 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) 3Ь 511,955 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions) 5 6 Adjusted qualifying distributions. Subtract line 5 from line 4 6 955.

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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Form 990-PF (2009)

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	3 %4	yo N	· · · · · · · · · · · · · · · · · · ·	647,702.
2 Undistributed income, if any, as of the end of 2009	, ,,	٠ 4	1,8 , 'o	. *
a Enter amount for 2008 only			0.	. ,
b Total for prior years 20, 20, 20	*	0.	3	
3 Excess distributions carryover, if any, to 2009	1 + i +	, ~ } ¥	.* , 🦛 °,	4 * 1
a From 2004 287, 235.		, ' & ' ' '	1	
b From 2005 227, 864.	** *	* "		
c From 2006 1,401,307.	*	**	** •	*
d From 2007 412,671.			> , ø ₩	`X
e From 2008	*		X 2	
f Total of lines 3a through e	2,329,077.	· - I, 🐠	,	*
4 Qualifying distributions for 2009 from Part	· 🚵		:	A 🐪 🤸
XII, line 4 ► \$ 511, 955.		,,		
a Applied to 2008, but not more than line 2a	, , , , , , , , , , , , , , , , , , , ,		0.	
b Applied to undistributed income of prior years	* .		* * .	,
(Election required – see instructions)	.,3	0.		
c Treated as distributions out of corpus	_			j
(Election required – see instructions)	0.	* '	*	, , , , , , , , , , , , , , , , , , ,
d Applied to 2009 distributable amount	<u> </u>	<u> </u>	*	511,955.
e Remaining amount distributed out of corpus	0.	2		
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the	135,747.	* * * * * * * * * * * * * * * * * * * *	<u> </u>	135,747.
same amount must be shown in column (a))	9	å. Å	* , ,	* *
	·	is do	•	
6 Enter the net total of each column as indicated below:	*	, ",	",	Ť
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,193,330.	*	, ·	,
	2,193,330.		<i>y</i> ** · · · · · · · · · · · · · · · · · ·	
b Prior years' undistributed income Subtract line 4b from line 2b	1	0.	3	,
	<u> </u>			
c Enter the amount of prior years' undistributed income for which a notice of deficiency	* 4 * **		* *	<u>`</u> *
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.	`, *	~x & \$
e Undistributed income for 2008 Subtract line 4a from		1 %		· · · · · · · · · · · · · · · · · · ·
line 2a. Taxable amount — see instructions.		, , ,	0.	
	* ×	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be		* * ;	, *	
distributed in 2010	**************************************	% ^h x √i,		0.
7 Amounts treated as distributions out of				en e
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)			** ; * · /*** ***	**
(see instructions)	0.	- H.W. J. 15	Z · . · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·
8 Excess distributions carryover from 2004 not				, 🐠 }
applied on line 5 or line 7 (see instructions).	151,488.	, , , , , , , , , , , , , , , , , , ,	. ****	
9 Excess distributions carryover to 2010.			**** * * * * * * * * * * * * * * * * *	```
Subtract lines 7 and 8 from line 6a	2,041,842.	2 (Nyy.)		
10 Analysis of line 9	*			.am
a Excess from 2005 227, 864.	* * · *	, , , , , , , , , , , , , , , , , , ,	* * *	*
b Excess from 2006 1, 401, 307.	*	,	<i>₹</i>	* , ,
c Excess from 2007 412, 671.			<u>د.</u>	_ ,
d Excess from 2008		Ç"	*	*
e Excess from 2009	<u> </u>	У У	s.v	<u> </u>

1a if the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, either the date of the ruling to Scheck box to indicate whether the foundation is a private operating foundation described in section 4942(0/3) or 4942(0/5) 2 a Enter the lesses of the daylated net income from Part I or the mineral most private rulinn from Part Nor 1 are privated in the private foundation of the private form of Part Nor 1 are pri	Part XIV Private Operating Foundation			VII-A, question 9	23-6262644	N/A
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed 8 89.5 of line 2a 6 Qualifying distributions from Part XII, 4 Knowsh, refuged is the Scrot used directly for achie control of sense and used from the sense and the sens	1 a If the foundation has received a ruling or o	letermination letter				
income from Part I or the minimum investment return from Part X for each year hated 8.5% of time 2a Coudifying distributions from Part XIII, and the part of the p	b Check box to indicate whether the foundate	ion is a private ope	rating foundation (described in section	4942(j)(3) or	4942(j)(5)
investment return from Part X for each year islated b 185% of line 2a (Countrying distributions from Part XII, line 4 for each year islated d Annous resident with season of the country of each year islated d Annous resident with season and circetty for active contact of exempt activities and country of each year islated of the country of the coun		Tax year		Prior 3 years		
c Cualifying distributions from Part XII, the 4 for each year Islaed d Amounts included a line iz coll 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 relied upon a "Assets' alternative test relied upon b "Indiversal failernative test - enter (1) Value of all assets (2) Value of assets qualifying under section 4942()(3(9b)) b "Indiversal failernative test - enter 2d of minimum investment return shown in Part X, line 6 for each year listed c "Support alternative test - enter 2d of minimum investment return shown in Part X, line 6 for each year listed c "Support alternative test - enter 2d of minimum investment return shown in Part X, line 6 for each year listed c "Support alternative test - enter 2d of minimum investment return shown in Part X, line 6 for each year listed c "Support alternative test - enter 2d of minimum investment returns (interest, on securities loans (section 512(e)(6)), or royaltes) (2) Value of 1842(a)(3(5)(6)(6)) (3) Largest amount of support from an exemption of support from the exemption of support from an exemption of support from the exemption of support from the exemption of support from the exemption of support from exemption of support fro	investment return from Part X for	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
In a 4 for each year isleed d Amounts molecular in lae? An used directly for active conduct of exempt activities Subtract line 2d Inform lae? © Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d Inform lae? © Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d Inform lae? © Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d Inform lae? © Yalue of all assets © Yalu	b 85% of line 2a					
for active conduct of exempt activities © Qualifying stirbutions made directly for active conduct of exempt activities Subtract line 2d from line 2 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 9492(0)(3)(9) b Indownert alternative test - enter (3) Total support other than gross investment etern shown in Pat X, time 6 for each year lotted (1) Total support other than gross investment income (interest, dividently, tents, peyments dividently, tents, peyments, peyments, tents, peyments,	line 4 for each year listed	···		<u></u>		
for active conduct of exempt activities Subtract line 2d from line 2b 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 9442(0)(3(b)0.0 b Codwinent alternative test – enter 2/3 of minimum invisitment refurs his 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 organization as provided in section 9492(X)(3(5)0), or royalties) (3) Largest amount of support from an exempt organization (4) Gross investment income Reative Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than \$5,000) (See section 507(0)(2)) None 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here * ∑ if 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 only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds: if the foundation only makes contributions to preselected charitable organizations under other conditions, complete terms 2a, b. c. and d b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	for active conduct of exempt activities	-				
alternative test relied upon a Assets alternative test – enter (1) Value of all assets (2) Value of all assets (2) Value of assets qualifying under section 4942(t)(3(9)(6)) b Endowment alternative test – enter 2/3 of manifum investment reum shown in Part X, like 6 for each year lated (2) Compared the properties of the state of t	for active conduct of exempt activities					
(1) Value of all assets (2) Value of assets qualifying under section 49342()(3(9)(1) b Endwment alternative test — enter 2/3 of minimum investment deuter shown in Pat X, tine 6 for each year isted C Support alternative test — enter (2) of minimum investment deuter shown in Pat X, tine 6 for each year isted 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 firm general public and 5 or more exempt organization as provided in section 494(0)(30(9))) (3) Largest amount of support from an exempt organization an exempt organization (4) Gross investment income 2artixiviii Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2)) None b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest None 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here * [X] if the foundation only makes contributions to preselected chantable 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 b The form in which applications should be submitted and information and materials they should include c Any submission deadlines						
Value of assets qualifying under section 4942()(3(6)) b Endowment alternative test — enter 2/3 of mine 5 for each year listed 1 shown in Part X, mine 5 for each year listed 1 shown in Part X, mine 5 for each year listed 1 shown in Part X, mine 5 for each year listed 1 shown in Part X, mine 5 for each year listed 1 shown in Part X, mine 5 for each year listed 1 shown in Part X, dividends, tents, payments of the 1 shown in Part X, dividends, tents, payments of 12(a)(5)), or royalties 1 shown in Part X, dividends, tents, payments of 12(a)(5)), or royalties 1 shown in Part X, dividends, tents, payments of 12(a)(5)), or royalties 1 shown in Part X, dividends, tents, payments of 12(a)(5)), or royalties 1 shown in Part X, dividends 1 shown in Part X, dividend						
section 4942()(3(8)(3)(6) b Endowent alterable test – enter 2.2 of minimum investment return shown in Part X, tine 6 for each year tisted c 'Support' alternative test – enter (1) Total support other than gross investment income (interest, on securities loans (section 512(a)(5)), or royalities) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(0)(3(B)(n)) (3) Largest amount of support from an exempt organization (2) Gross investment income 2antXVIII Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than \$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 \(^{\text{NI}}\) if the foundation makes grifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	` '					
minimum investment return shown in Part X, tine 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 royalities) (2) Support from general public and 5 or more exempt organizations as provided in settin 492(X)(3)(8)(w) (3) Largest amount of support from an exempt organization (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2)) None b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest None 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here * X if the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete terms 2a, b. c, and d b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	section 4942(j)(3)(B)(i)					
(1) Total support other than gross investment income (interest, dividends, rents, payments, on securities loans (section \$12(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section \$942(i)(3)(8/iii) (3) Largest amount of support from an exempt organization Assets at any time during the year — see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2)) None b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest None 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here \(\subset \subseteq \subseteq \subseteq \subseteq 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 tiems 2a, b, c, and of a The name, address, and telephone number of the person to whom applications should be addressed b The form in which applications should be submitted and information and materials they should include	minimum investment return shown in Part X.					
investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalities) (2) Support from general public and 5 or more exempt organizations as provided in section 4942((3)(8)(m)) (3) Largest amount of support from an exempt organization of support from an exempt organization (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than \$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 * X 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 tierns 2a, b., c, and d b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	c 'Support' alternative test - enter					
more exempt dragnizations as provided in section 4942()(3/8)(%)) (3) Largest amount of support from an exempt organization (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2)) None b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest None 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here \[\begin{array}{ c c c c c c c c c c c c c c c c c c c	investment income (interest, dividends, rents, payments on securities loans (section					
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Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2)) None b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest None 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here * X 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 b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	(3) Largest amount of support from					
assets at any time during the year — see instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2)) None b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest None 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs: Check here \(\text{\te	(4) Gross investment income					
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 \(^{\text{N}} \) 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 b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	RartXV. Supplementary Information assets at any time during the	(Complete this e year – see in	part only if the structions.)	organization ha	d \$5,000 or mor	e in
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 b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	a List any managers of the foundation who close of any tax year (but only if they have	have contributed me	ore than 2% of the than \$5,000) (See	total contributions researchers section 507(d)(2))	eceived by the found	dation before the
Check here X 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 The name, address, and telephone number of the person to whom applications should be addressed The form in which applications should be submitted and information and materials they should include C Any submission deadlines	a partnership or other entity) of which the	own 10% or more of foundation has a 1	f the stock of a co 0% or greater inte	rporation (or an equarest	ally large portion of	the ownership of
Check here \(^{Normal in 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 b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	2 Information Bosonding Contribution Co-	nt Gift Loom Sale	larchin etc Deser			
a The name, address, and telephone number of the person to whom applications should be addressed b The form in which applications should be submitted and information and materials they should include c Any submission deadlines	Check here \(\overline{X} \) if the foundation only requests for funds. If the foundation make	nakes contributions	to preselected ch	arıtable organization:		
c Any submission deadlines		er of the person to	whom applications	should be addressed	i i	
c Any submission deadlines						
	b The form in which applications should be	submitted and infor	mation and materi	als they should inclu	de	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors.	c Any submission deadlines					
	d Any restrictions or limitations on awards,	such as by geograp	hical areas, charit	able fields, kinds of i	nstitutions, or other	factors.

3 Grants and Contributions Paid During the Y	ear or Approved for Fut	ure Pavmen	ıt	
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	Contribution	
a Paid during the year				
See statement 12		none		275,000.
,				
		ł		
	i			
Total			► 3a	275,000.
b Approved for future payment				
Total	<u> </u>	L	 	
ıvlaı			- 3b	1

Fees and contracts from government agencies	(e) Related or exempt function income see the instruction:
Fees and contracts from government agencies	see the instruction
Fees and contracts from government agencies	
Fees and contracts from government agencies	
Fees and contracts from government agencies	
Fees and contracts from government agencies	
Fees and contracts from government agencies	
Membership dues and assessments	
Interest on savings and temporary cash investments	
Dividends and interest from securities 14 349,029.	
Net rental income or (loss) from real estate: Debt-financed property	
Not debt-financed property	
Net rental income or (loss) from personal property	
Other investment income	
Gain or (loss) from sales of assets other than inventory 14 54, 468.	
Net income or (loss) from special events	
Gross profit or (loss) from sales of inventory	
Other revenue	1. 34
1 1	
Subtotal Add columns (b), (d), and (e)	
	403,49
Total. Add line 12, columns (b), (d), and (e)	

▼	accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See the instructions)
N/A	

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

,	descri	e organization direct bed in section 501(c) ig to political organiz	of the Code (o	ngage in any of th ther than section	he following wit 501(c)(3) organ	h any othe iizations) o	r organizatio r in section !	n 527,	1		
		fers from the reporting		a noncharitable e	exempt organiza	ation of					
	(1) C	•	ig roundation to	2 110110110110110	mornpr organiza				1a (1)	Lineral	X
		ther assets							1a (2)		X
		transactions								350	
		ales of assets to a no	oncharitable exe	mpt organization					1 b (1)	**********	X
	• •	urchases of assets fr		, -	nization				1 b (2)		Х
	• •	ental of facilities, equ							1 b (3)		Х
		eimbursement arrang							1 b (4)		X
	• •	oans or loan guarante	•						1 b (5)		X
	(6) P	erformance of service	es or membersh	ip or fundraising	solicitations				1 b (6)		X
	c Sharii	ng of facilities, equip	ment, mailing lis	sts, other assets,	or paid employe	ees			1 c		X
	the go any tr	answer to any of the bods, other assets, or ansaction or sharing	r services given arrangement, s	by the reporting f how in column (d)	oundation If th the value of th	e foundation in goods, o	on received l <u>ither assets,</u>	ess than fair more or services rec	narket value ir eived		
_	Line no.	(b) Amount involved	(c) Name (of noncharitable exemp	ot organization	(d) De	scription of tran	sfers, transactions	, and sharing arra	ngement	<u>.s</u>
N	<u>/</u> A										
_	_										
								<u> </u>			
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	descr	foundation directly on the control of the control o) of the Code (o	ated with, or relat	ted to, one or m 501(c)(3)) or in	nore tax-ex section 52	empt organi;	zations	Ye	s X	No
		(a) Name of organization	ation	(b) Type	of organization		(0) Description o	f relationship		
N	<u>/</u> A										
_				 			_	-			
											——
_											
	Under pena complete	alties of perjury, I declare the Declaration of preparer (other	at I have examined the than taxpayer or fin	lis return, including acc duciary) is based on all	ompanying schedule information of which	s and stateme preparer has	nts, and to the b any knowledge	est of my knowledge	e and belief, it is tr	ue, corre	ct, and
s	▶	() W			_ા ,ુે.	2.11	► Presid	ent		
S I G N	Sign	ature of officer or trustee	1		Date			Title			
N HERE	Paid	Preparer's signature	Willed	Dand (PA	Date	26/11	Check if self-employed	Preparer's Identif (See Signature in N/A	ying num the insti	ber rs)
Ë	Pre- parer's	Firm's name (or Jea	nne Milhol	land, PC	<u> </u>		- / :'-	EIN N/A			
	Use	Lyours of solf	4 Camino A		·				-		
	Only	laddrook ond		87505	-			Phone no	(505) 670	-884	1
B	4.4							·	Form 9		

2009	Fe	deral Stater	nents		Page 1
	Max and	Anna Levinson	Foundation		23-6282844
Statement 1 Form 990-PF, Part I, Line 16a Legal Fees			•		
		(a) Expenses Per Books	(b) Net Investment <u>Income</u>	(c) Adjusted <u>Net Income</u>	(d) Charitable <u>Purposes</u>
Miscellaneous	Total	\$ 260. \$ 260.	\$ 0.		\$ 260. \$ 260.
Statement 2 Form 990-PF, Part I, Line 16b Accounting Fees		-			
Tax compliance & monthly	reporting Total	(a) Expenses per Books \$ 8,149. \$ 8,149.	<u>Income</u> \$ 8,149.	(c) Adjusted Net Income	(d) Charitable Purposes \$ 0.
Statement 3 Form 990-PF, Part I, Line 18 Taxes					
Excise Payroll	Total	(a) Expenses per Books \$ 8,000. 8,563. \$ 16,563.		(c) Adjusted Net Income	(d) Charitable Purposes \$ 8,563. \$ 8,563.
Statement 4 Form 990-PF, Part I, Line 23 Other Expenses					
Amortization Board Meetings Employee benefits Insurance Internet Investment and Bank fees Miscellaneous Office Supplies Postage Storage Telephone	Total	(a) Expenses per Books \$ 7,258. 8,146. 6,350. 2,696. 869. 72,521. 2,778. 977. 379. 441. 2,892. \$ 105,307.	\$ 7,258.	(c) Adjusted Net Income	(d) Charitable Purposes \$ 8,146. 6,350. 2,696. 869. 72,521. 2,778. 977. 379. 441. 2,892. \$ 98,049.

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Federal Statements

Page 2

Max and Anna Levinson Foundation

23-6282844

Statement 5
Form 990-PF, Part II, Line 10a
Investments - U.S. and State Government Obligations

U.S. Government Obligations	Valuation <u>Method</u>	Book Value	Fair Market Value
US Govt & Agency Issues	Cost	\$ 3,429,762. \$ 3,429,762.	\$ 3,592,776. \$ 3,592,776.
State/Municipal Obligations	Valuation <u>Method</u>	Book Value	Fair Market Value
State & Municipal Obligations	Cost	53,622. \$ 53,622.	52,498. \$ 52,498.
	Total	<u>\$ 3,483,384.</u>	\$ 3,645,274.

Statement 6 Form 990-PF, Part II, Line 13 Investments - Other

	Valuation <u>Method</u>	 Book Value	F	air Market Value
Other Publicly Traded Securities				
Corporate Dept Securities Financials Mutual Funds Consumer Products Consumer Discretionary Industrial Products & Services Industrial Materials Information Technology Health Care Energy Money Market Utilities	Cost Cost Cost Cost Cost Cost Cost Cost	\$ 1,040,364. 881,970. 575,000. 1,207,131. 701,044. 893,854. 304,121. 1,297,935. 994,186. 777,088. 138,778. 58,414.	\$	1,033,296. 1,043,341. 712,148. 1,358,944. 945,927. 1,170,513. 352,588. 1,340,787. 1,189,725. 778,600. 138,778. 80,748.
	Total	\$ 8,869,885.	\$	10,145,395.

Statement 7 Form 990-PF, Part II, Line 14 Land, Buildings, and Equipment

<u>Category</u>			Basis		Accum. Deprec.		Book Value	Fa	air Market Value
Furniture and Fixtures	Total	\$ \$	30,833. 30,833.	\$ \$	30,833. 30,833.	\$ \$	0.	\$ \$	<u>0.</u>

009	Federal Stateme	ents			Page
	lax and Anna Levinson Fo	oundation			23-628284
Statement 8 Form 990-PF, Part II, Line 15 Other Assets					
A/R Employee Accrued Interest		- \$ Total <u>§</u>	59		r Market Value 665. 59,992. 60,657.
Statement 9 Form 990-PF, Part VIII, Line 1 List of Officers, Directors, Trustees,	Title and Average Hours		pen-	Contri- bution to	
Name and Address Ed Levinson PO Box 237 Mill Valley, CA 94942	Per Week Devote Director 2.00	<u>\$</u> \$	<u>ion</u> 0.	<u>EBP & DC</u> \$ 0.	<u>Other</u> \$ 0
Charlotte Talberth PO Box 6309 Santa Fe, NM 87502-6309	President 40.00	10	2,000.	15,000.	0
Gordon Levinson 7337 Corte Tomillo Carlsbad, CA 92009	Director 2.00		0.	0.	C
Peter Gabel 386 Elizabeth St. San Francisco, CA 94114	Director 2.00		0.	0.	C
Rachel Krich 2 Schweid Ct. Fair Lawn, NJ 07410	Treasurer 2.00		0.	0.	0
Robin Beck PO Box 6309 Santa Fe, NM 87502-6309	Vice President 2.00		0.	0.	0
Julian Levinson 292 Riverside Dr., Apt 4A New York, NY 10025	Director 2.00		0.	0.	0
Suntara Loba PO Box 6309 Santa Fe, NM 87505	Director 2.00		0.	0.	0

Secretary 2.00

Carol Doroshow 8246 4th Ave., NE Seattle, WA 98115

	_			
Total	\$	102,000.	\$ 15,000.	\$ 0.

0. 0.

0.

MAX & ANNA LEVINSON FNDN ENDOW IMA 1-01927 Schedule D Detail of Short-term Capital Gains and Losses

	Date	Date	Gross Sales	Cost or Other	Short-term
Description	Acquired	Sold	Price	Basis	Gain/Loss
<u>.</u>	01/13/2009	06/11/2009	98,298.65	99,477.68	-1,179.03
—					
\searrow	02/12/2009	06/24/2009	77,461.67	78,399.45	-937.78
100000. FED HOME LN BK CONS DISC					
60/	12/29/2008	08/11/2009	99,331.15	99,208.93	122.22
100000. FED HOME LN BK CONS DISC					
12/22/09	12/29/2008	08/19/2009	99,427.15	99,208.92	218.23
3000. WEATHERFORD INTERNATIONAL LT	06/10/2009	/03/	830.	,650.8	
$\mathbf{\mathcal{C}}$	/12/	/60/	289	199,876.00	413.
100. JOHNSON CONTROLS INC	01/02/2009	/22/	562.	1,933.	729.
FED HOME LN BKS 1.			101,213.43	99,938.00	
FED HOME LN BKS 1.	127	/60/	670.	199,642.08	027.
		12/11/2009	748.		164.
10. FED HOME LN BKS 1.	02/21/2009	01/06/2010	026	99,821.04	205.
. SCHWAB CHARLES CORP NEW C	٧		551.		
1500. NOKIA AB ADR	VAR	/27/	588.	377.	-1,788.83
1900. CAMERON INTL CORP	04/08/2010	_		.722.	
6, Southside Bancshares	8/26/2008		・タナー	147.58	C.
					- 1
Totals			80'521'182')	13:881,785,1	(13,350,43/
The state of the s					
					1
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STATEMENT 10, PAGE 1 OF 1

STATEMENT 11, PAGE 1 OF 3

MAX & ANNA LEVINSON FNDN ENDOW IMA 1-01927 Schedule D Detail of Long-term Capital Gains and Losses

	Date	Date	Gross Sales	Cost or Other	Long-term
uoisdussan	Acquired	Pios	B2	Sign	200
15% RATE CAPITAL GAINS (LOSSES)					
400. PRICE T ROWE GROUP INC	05/19/2000	06/04/2009	17,016.78	7,463.70	9,553.08
GENERAL MILLS INC	/14/	/10/	ł •	42,131.72	,818.
10	/13/	/12/		,845.	154.97
39.27 GNMA POOL #567570 6.500%					
3/15/32	04/09/2002	06/15/2009	39.27	39.59	-0.32
84.85 GNMA POOL #567597 6.500%					
4/15/32	07/19/2002	06/15/2009	8		2
2533.53 GNMA POOL #781776 6.000%	07/20/2004	06/15/2009	2,533.53	2,606.77	-1
6299.95 GNMA POOL #658132 6.000%	12/11/2006	06/15/2009		- 4	• • •
SIGMA ALDRICH CORP	05/24/2004	06/26/2009	19,858.75	11,236.08	8,622.67
100. DONALDSON COMPANY, INC.	06/23/2008	07/08/2009	٠,	1	-1
	VAR	01/08/2009	37,031.76	51,379.28	7
900, 3M CO	VAR	`~!	,938.	•1	•
6 GNMA POOL	04/09/2002	07/15/2009	,100.	2,117.67	-17.07
8 GNMA F	07/19/2002	_	디	103.40	-3.22
2371.42 GNMA POOL #781776 6.000%	07/20/2004	07/15/2009	2,371.42	2,439.97	-68.55
	12/11/2006	07/15/2009	,830.	.908	-78.49
1600. COLGATE-PALMOLIVE COMPANY	10/06/2004	07/24/2009	J	٠,	.091.
300. MEDTRONIC, INC.	06/12/2001	07/31/2009	10,631.63	13,254.90	•
1000. AT & T INC	06/23/2008	08/11/2009	25,377.74	34,553.00	-9,175.26
34.94 GNMA POOL #567570 6.500%					
3/15/32	04/09/2002	08/15/2009	34.94	35.22	-0.28
85.94 GNMA POOL #567597 6.500%					
/15/32	07/19/2002	08/15/2009	85.94	88,71	-2.77
	07/20/2004	08/12/5003	1,523.86	1,567.91	-44.05
.03 GNMA POOL	12/11/2006	08/12/5009	3,710.03	3,770.32	-60.29
38.39 GNMA POOL #567570 6.500%					
3/15/32	04/09/2002	09/15/2009	38.39	38.70	-0.31
88.16 GNMA POOL #567597 6.500%					
4/15/32	07/19/2002	09/12/5009	88.16	91.00	-2.84
1374.91 GNMA POOL #781776 6.000%	07/20/2004	09/15/2009		1,414.65	-39.74
GNMA POOL #658	12/11/2006	09/15/2009	3,562.23	3,620.12	-57.89
Totals					

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MAX & ANNA LEVINSON FNDN ENDOW IMA 1-01927 Schedule D Detail of Long-term Capital Gains and Losses

	Date	Date	Gross Sales	Cost or Other	Long-term
	Acquired	Sold	Price	3asis	
HNSON & JOHNSON	2	/18/2	724.	7,347.	7,377.31
BKS	06/05/2008	10/15/2009	100,590.90	101,236.04	-645.14
40.2 GNMA POOL #567570 6.500%					
3/15/32	04/09/2002	10/15/2009	40.20	40.53	-0.33
92.04 GNMA POOL #567597 6.500%					
4/15/32	07/19/2002	10/15/2009	92.04	95.00	-2.96
. 40	07/20/2004	0/15/200	6.4	7	
49 GNMA POOL #658132 6.	1/	0/15/200	,156.	,207.7	•
INSON CONTROLS INC	04/21/2008	10/22/2009	,662.	,532.1	-869.61
40.44 GNMA POOL #567570 6.500%					
3/15/32	04/09/2002	11/15/2009	40.44	40.77	-0.33
93.25 GNMA POOL #567597 6.500%					
3	07/19/2002	11/15/2009	93.25	96.25	-3.00
1692.86 GNMA POOL #781776 6.000\$	07/20/2004	11/15/2009	1,692.86	1,741.79	
3852.36 GNMA POOL #658132 6.000%	12/11/2006	11/15/2009	3,852.36	3,914.96	-62.60
	10/30/2008	12/01/2009	46,608.43	35,110.08	
35.84 GNMA POOL #567570 6.500%					
	04/09/2002	12/12/2009	35.84	36.13	-0.29
88.02 GNMA POOL #567597 6.500%					
4/15/32	07/19/2002	12/15/2009	88.02	90.85	-2.83
2129.41 GNMA POOL #781776 6.000%	07/20/2004	12/15/2009	2,129.41	2,190.96	-61.55
2567.88 GNMA POOL #658132 6.000%	12/11/2006	12/15/2009	2,567.88	1	-41.73
1500. NOVARTIS AG	08/08/2008	01/07/2010	77,976.84	86,729.98	-8,753.14
D. FED HOME LN BKS	06/05/2008	01/08/2010	500,000.00	506,180.18	-6,180.18
150000. TREASURY INFL IDX 3.50%					
1/15/11	07/31/2001	01/08/2010	193,825.71	186,574.15	7,251.56
700. BP PLC	VAR	01/12/2010	42,669.95	41,185.32	1,484.63
37.66 GNMA POOL #567570 6.500%					
	04/09/2002	01/15/2010	37.66	37.97	-0.31
88.53 GNMA POOL #567597 6.500%					
2	07/19/2002	01/15/2010	88.53	91.38	-2.85
17 GNMA POOL #781776 6.	//20/	01/15/2010	2,714.17	2,792.63	-78.46
.19 GNMA POOL #6581	(11/	/15/	2,884.19	2,931.06	-46.87
COLGATE - PAI	/90/0	1/29/201	4,062.9	۳.	10,653.61
2200. ADOBE SYS INC	10/30/2008	02/01/2010	71,107.17	59,417.05	11,690,12
Totals					

JSA 9F0970 2 000

MAX & ANNA LEVINSON FNDN ENDOW IMA 1-01927 Schedule D Detail of Long-term Capital Gains and Losses

	Date	Date	Gross Sales	Cost or Other	Long-term
Description	Acquired	Sold	Price	Basis	Gain/Loss
47341.// GMMA FOOD #36/39/ 6.3008	2002/61/20	02/08/2010	52 792 59	50 929 9K	1 862 63
┥・		2 - 2 - 2 - 2			
15/34	07/20/2004	02/10/2010	81,584.14	78,819.56	2,764.58
32	12/11/2006	02/10/2010	•	55,656.80	I •/
12702.16 GNMA POOL #567570 6.500%					
3/15/32	04/09/2002	\sim	0	12,805.37	656.67
0	04/09/2002	02/15/2010	3,002.29	٦	-24,40
89.07 GNMA POOL #567597 6.500%					
4/15/32	07/19/2002	02/15/2010	20.68	91.94	-2.87
1481.86 GNMA POOL #781776 6.000%	07/20/2004	02/15/2010	•1	1,524.70	-42.84
2564.77 GNMA POOL #658132 6.000%	12/11/2006	02/15/2010	2,564.77	2,606.45	-41.68
4100. BP PLC	VAR	0102/11/20	223,704.04	183,884.94	39,819.10
50000. FED HOME LN BKS 1.625%	02/27/2009	04/23/2010	50,449.00	910.	
NOKIA AB ADR	α.	/21/		85,108.41	-29,343.62
SAP AG	04/02/2007	\sim	88,869.95	149.	1,279.
). OH]	01/14/2009	7	.974.	١ ٦	,481.
900. APTARGROUP, INC.	05/17/2007	05/27/2010	.776.	33,145.65	,630.
				- 1	
TOTAL 15% RATE CAPITAL GAINS (LOSSES)			2335096.17	2267276.54	67,819.63
Totals			2335096.17	2267276.54	67,819.63

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Organization Actors Theatre of San Francisco 855 Bush Street San Francisco CA 94108	Purpose General Operating Support	Amount awarded 1000	<u>Check no.</u> 5967	<u>Date Paid</u> 6/8/2009
Organization ProNica Inc. 130 19th Ave. SE St. FL 33705	Purpose Casa Materna	Amount awarded 3000	<u>Check no.</u> 5968	<u>Date Paid</u> 6/8/2009
Organization Foundation for Exhibition of Photography 4027 Zenith Ave. South Minneapolis MN 55410	<u>Purpose</u> Robert Bergman exhibit	Amount awarded 4000	<u>Check no.</u> 5971	<u>Date Paid</u> 6/27/2009
Organization Africa Yoga Project POB 69 Woodstock NY 12498	Purpose Circus featuring African youth .	Amount awarded 3000	<u>Check no.</u> 5966	<u>Date Paid</u> 7/5/2009
Organization American Forest Alliance 11 Salem Hill Road Weaverville NC 28787	Purpose Opposition to mountain top removal	Amount awarded 3000	<u>Check no.</u> 5977	<u>Date Paid</u> 7/9/2009
Organization Hagar Education for Equality POB 3369 Beer Sheva Israel	<u>Purpose</u> Bilingual kindergarten	Amount awarded 2000	<u>Check no.</u> 5978	<u>Date Paid</u> 7/9/2009
Organization The Art Barge POB 1266 Amagansett NY 11930	Purpose Kids art program	Amount awarded 500	<u>Check no.</u> 5979	<u>Date Paid</u> 7/9/2009
Organization Avon 29167 Quail Run	Purpose walk for breast cancer	Amount awarded 500	<u>Снеск по.</u> 5982	<u>Date Paid</u> 7/15/2009

Organization Iames Lick School PTA 31 Bennington Street San Francisco CA 94110	<u>Purpose</u> Michelle Obama Edible Schoolyard Garden.	Amount awarded 3000	<u>Check no.</u> 5983	<u>Date Paid</u> 7/16/2009
Organization Hostelling International 425 Divisadero San Francisco CA 94117	Purpose murał project	Amount awarded 6850	<u>Сћеск по.</u> 5985	<u>Date Paid</u> 7/23/2009
Organization MindFreedom International POB 11284 Eugene OR 97440	<u>Purpose</u> mental health support	Amount awarded 5000	<u>Check no.</u> 5987	<u>Date Paid</u> 7/28/2009
Organization Vallecitos Mountain Ranch PO Box 3160 Taos NM 87571	<u>Purpose</u> Retreat scholarship fund	Amount awarded 2,500	<u>Check no.</u> 5984	<u>Date Paid</u> 7/16/2009
Organization The Ruckus Society POB 28741 Oakland CA 94604	Purpose Climate Conference	Amount awarded 10000	<u>Check no.</u> 5993	<u>Date Paid</u> 7/31/2009
Organization Hickman Friends Senior Community 400 N. Walnut St. West Chester PA 19380	<u>Purpose</u> Resident Assistance Fund	Amount awarded 10,000	<u>Check no.</u> 5994	<u>Date Paid</u> 7/31/2009
Organization Kindred Spirits Animal Sanctuary 3749-A Hwy 14 Santa fe NM 87508	<u>Purpose</u> general support	Amount awarded 1,000	<u>Check no.</u> 5995	<u>Date Paid</u> 8/3/2009
Organization Chaminade College Preparatory 10210 Oakdale Ave.	<u>Purpose</u> Scholarship fund	Amount awarded 3,500	<u>Check no.</u> 5998	<u>Date Paid</u> 8/8/2009

Organization Encinitas Union School District 3330 Calle Barcelona Carlsbad CA 92009	<u>Purpose</u> Mission Estancia	Amount awarded 3,000	<u>Check no.</u> 6000	<u>Date Paid</u> 8/17/2009
Organization MADD-San Diego County 938 South Andreasen Dr. #M Escondido CA 92029	Purpose general support	Amount awarded 5000	<u>Check no.</u> 6005	<u>Date Paid</u> 9/8/2009
Organization Mission Estancia PTA 3330 Calle Barcelona Carlsbad CA 92009	<u>Purpose</u> general Support	Amount awarded 3000	<u>Check no.</u> 6006	<u>Date Paid</u> 9/8/2009
Organization Diegueno Middle School 2150 Village Park way Encinitas CA 92024	<u>Purpose</u> Fall fundraiser	Amount awarded 500	<u>Check no.</u> 6007	<u>Date Paid</u> 9/8/2009
Organization Institute for Policy Studies 1601 Connecticut Avenue NW Washington DC 20009	Purpose	Amount awarded 2500	<u>Check no.</u> 6008	<u>Date Paid</u> 9/8/2009
Organization Foundation for Exhibition of Photography 4027 Zenith Ave. South Minneapolis MN 55410	<u>Purpose</u> Robert Bergman exhibit	Amount awarded 2000	<u>Check no.</u> 6014	<u>Date Pald</u> 9/22/2009
Organization Education and T991 Ludwig Santa Rosa CA 95407	<u>Purpose</u> to create green jobs	Amount awarded 3000	<u>Check no.</u> 6018	<u>Date Paid</u> 10/2/2009
Organization Arizona Rivers 1639 W. Roma Ave.	<u>Purpose</u> General Support	Amount awarded 5000	<u>Check ng.</u> 6020	<u>Date Paid</u> 10/7/2009

Organization Roots of Israel 724 Eastern Pkwy. Brooklyn NY 11213	<u>Purpose</u> general support	Amount awarded 18,000	<u>Check no.</u> 6021	<u>Date Paid</u> 10/13/2009
Organization Pawsitive Teams 12357 Lomica Dr. San Diego CA 92128	<u>Purpose</u> general support	Amount awarded 6000	<u>Check no.</u> 6022	<u>Date Paid</u> 10/13/2009
Organization Blue Canyon Productions P.O. Box 6622 Santa Fe NM 87502	Purpose Production and distribution of educational videos	Amount awarded 600	<u>Check no.</u> 6026	<u>Date Paid</u> 10/31/2009
Organization New Mexico Environmental Law Center 1405 Luisa Street Santa Fe NM 87505	<u>Purpose</u>	Amount awarded 5080	<u>Check no.</u> 6033	<u>Date Paid</u> 11/09/2009
Organization Santa Fe Watershed Association 1413 Second Street Santa Fe NM 87505	<u>Purpose</u> general support	Amount awarded 5000	<u>Check no.</u> 6034	<u>Date Paid</u> 11/21/2009
Organization Public Benefits Attorneys 580 Howard St. #303 San Francisco CA 94105	Purpose legal representation for disabled clients	Amount awarded 10,000	<u>Check no.</u> 6035	<u>Date Paid</u> 11/21/2009
Organization Hickman Friends Senior Community 400 N. Walnut St. West Chester PA 19380	<u>Purpose</u> Resident Assistance Fund	Amount awarded 10,000	<u>Check no.</u> 6040	<u>Date Paid</u> 12/3/2009
Organization Blue Canyon Productions P.O. Box 6622	<u>Purpose</u> Educational video trailer	Amount awarded 450.	<u>Check no.</u> 6041	<u>Date Paid</u> 12/6/2009

Organization Taos Jewish Center 1335 Gusdorf Rd. #R Taos NM 87571	<u>Purpose</u> Core Support	Amount awarded 5000	<u>Check no.</u> 6042	<u>Date Paid</u> 12/8/2009
Organization Herocare 8695 College Parkway, #219 Fort Meyers FL 33919	Purpose resources for wounded servicemen and women	Amount awarded 3000	<u>Check no.</u> 6043	<u>Date Paid</u> 12/8/2009
Organization Taos County Economic Development Corporation P.O. Box 1389 Taos NM 87571	Purpose Construction Development Program	Amount awarded 11,300	<u>Check no.</u> 6044	<u>Date Paid</u> 12/9/2009
Organization Taos County Economic Development Corporation P.O. Box 1389 Taos NM 87571	Purpose Construction Development Program	Amount awarded 11,300	<u>Check no.</u> 6046	<u>Date Paid</u> 12/31/2009
Organization Oxfam America POB 1211 Albert Lea MN 56007	<u>Purpose</u> Humanitarian Response: Haiti	Amount awarded 6,500	<u>Check no.</u> 6052	<u>Date Paid</u> 1/14/2010
Organization New West Media 42 West San Francisco Santa Fe NM 87501	<u>Purpose</u> film about mental illness	Amount awarded 2000	<u>Check no.</u> 6057	<u>Date Paid</u> 1/30/2010
Organization Taos County Economic Development Corporation P.O. Box 1389 Taos NM 87571	Purpose Construction Development Program	Amount awarded 20000	<u>Check no.</u> 6055	<u>Date Paid</u> 1/25/2010
Organization Oxfam America POB 1211	<u>Purpose</u> Humanitarian Response: Haiti	Amount awarded 4000	<u>Check no.</u> 6056	<u>Date Paid</u> 1/26/2010

Organization Media Island International Box 7204 Olympia WA 98507	<u>Purpose</u> Youth climate organizing	Amount awarded 8000	<u>Check по.</u> 6059	<u>Date Paid</u> 2/1/2010
Organization Blue Canyon Productions P.O. Box 6622 Santa Fe NM 87502	<u>Purpose</u> general support	Amount awarded 500	<u>Check no.</u> 6064	<u>Date Paid</u> 2/3/2010
Organization Actors Theatre of San Francisco 855 Bush Street San Francisco CA 94108	<u>Purpose</u> General Operating Support	Amount awarded 3000	<u>Check no.</u> 6067	<u>Date Paid</u> 2/8/2010
Organization Education and T991 Ludwig Santa Rosa CA 95407	<u>Purpose</u> to create green jobs	Amount awarded 3000	<u>Check no.</u> 6066	<u>Date Paid</u> 2/8/2010
Organization American Cancer Society 1710 Webster St. Oakland CA 94612	<u>Purpose</u> general support	Amount awarded 2,500	Check no. 6073	<u>Date Paid</u> 3/4/2010
Organization Amigos De Las Americas 5618 Star Lane Houston TX 77057	<u>Purpose</u> Community service program	Amount awarded 1,500	<u>Check no.</u> 6079	<u>Date Paid</u> 3/22/2010
Organization Encinitas Unified School District 3330 Calle Barcelona Carlsbad CA 92009	<u>Purpose</u> General Support	Amount awarded 3,000	<u>Check no.</u> 6080	<u>Date Paid</u> 3/22/2010
Organization WNYC Radiolab 160 Varick Street	Purpose Radiolab believes your ears are a portal to another world.	Amount awarded 1500	<u>Check no.</u>	<u>Date Paid</u> 3/24/2010

Organization California Institute for Yiddish Culture and Language 333 Washington Blvd. #118 Marina del CA 90292	Purpose Initiatives include collecting, restoring, and cataloging books	Amount awarded 2000	<u>Check no.</u> 6081	<u>Date Paid</u> 3/25/2010
Organization Institute for Policy Studies 1601 Connecticut Avenue NW Washington DC 20009	Purpose Book about Capitalism	Amount awarded 20000	<u>Check no.</u> 6083	<u>Date Paid</u> 4/1/2010
Organization The Ruckus Society PO Box 28741 Oakland CA 04604	Purpose Funding for core programs.	Amount awarded 2000	<u>Check no.</u> 6087	<u>Date Paid</u> 4/8/2010
Organization Hickman Friends Senior Community 400 N. Walnut St. West Chester PA 19380	<u>Purpose</u> Resident Assistance Fund	Amount awarded 15,000	<u>Check no.</u> 6075	<u>Date Paid</u> 4/28/2010
Organization Vallecites Mountain Ranch PO Box 3160 Taos NM 87571	<u>Purpose</u> Retreat scholarship fund	Amount awarded 5000	<u>Check no.</u> 5679	<u>Date Paid</u> 5/2/2010
Organization New West Media 42 West San Francisco Santa Fe NM 87501	<u>Purpose</u> film about mental illness	Amount awarded 6000	<u>Check no.</u> 6094	<u>Date Paid</u> 5/11/2010
Organization Institute for Labor and Mental Health 2342 Shattuck Berkeley CA 94704	<u>Purpose</u> general support	Amount awarded 1000	<u>Check no.</u> 6097	<u>Date Paid</u> 5/22/2010
	Total	\$275,000.		

Total

\$275,000.

Form **8868** (Rev April 2009)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No 1545-1709

If you are	e filing for an Automatic 3-Month i	Extension, complete only Part I and check this bo	X		► [X]
If you are	filing for an Additional (Not Auto	matic) 3-Month Extension, complete only Part II	(on page 2 of thi	s form)	
Do not comp	plete Part II unless you have alread	dy been granted an automatic 3-month extension	on a previously f	filed Form 8868	
Part I	Automatic 3-Month Extensi	on of Time. Only submit original (no cop	oies needed).		
A corporation	required to file Form 990-T and i	requesting an automatic 6-month extension - che	ck this box and o	complete Part I d	nly 🟲 🗍
All other corp	porations (including 1120-C filers).	partnerships, REMICS, and trusts must use Forn	n 7004 to request	t an extension of	time to file
income tax r			,		
the additional Form 990-T	I (not automatic) 3-month extensi	ectronically file Form 8868 if you want a 3-month in required to file Form 990-T). However, you can on or (2) you file Forms 990-BL, 6069, or 8870, gr o completed and signed page 2 (Part II) of Form 8 -file for Charities & Nonprofits	roup returns, or a	composite or co	nsolidated
	Name of Exempt Organization			Employer identificat	on number
Type or					
print	Max and Anna Levinson	n Foundation		23-6282844	Į
File by the due date for	Number, street, and room or suite number	If a P O box, see instructions	<u></u>	<u> </u>	
filing your return See	PO Box 6309				
instructions	City, town or post office, state, and ZIP cod	e For a foreign address, see instructions			
	Santa Fe, NM 87502-63	309			
Check type of	of return to be filed (file a separat	e application for each return)			
Form 990	0 [Form 990-T (corporation)	Form 472	20	
Form 990	0-BL	Form 990-T (section 401(a) or 408(a) trust)	Form 522	27	
Form 990	0-EZ	Form 990-T (trust other than above)	Form 606	59	
X Form 990	0-PF	Form 1041-A	Form 887	70	
If the orgIf this is check this	for a Grou <u>p R</u> eturn, enter the orga	FAX No. ► or place of business in the United States, check to anization's four digit Group Exemption Number (Gline group, check this box ► and attach a list	EN) If		
	•	ns for a corporation required to file Form 990-T) ex			
		the exempt organization return for the organizatio	n named above		
The ex	tension is for the organization's re	eturn for			
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	calendar year 20 or	00 00	. 10		
► X	tax year beginning6/01	$_{-}$, 20 $_{09}$, and ending $_{5/31}$, 20	10		
2 If this t	ax year is for less than 12 months	s, check reason Initial return Final	return C	Change in accoun	ting period
	application is for Form 990-BL, 990 undable credits. See instructions	0-PF, 990-T, 4720, or 6069, enter the tentative tax	k, less any	3a \$	7,762.
	application is for Form 990-PF or 9 Include any prior year overpayme	990-T, enter any refundable credits and estimated nt allowed as a credit	tax payments	3b \$	8,000.
deposit	e Due. Subtract line 3b from line 3 twith FTD coupon or, if required, structions.	Ba Include your payment with this form, or, if requestion using EFTPS (Electronic Federal Tax Payment	uired, System)	3c \$	0.
Caution. If y payment inst		c fund withdrawal with this Form 8868, see Form	8453-EO and For	rm 8879-EO for	
BAA For Pr	vacy Act and Paperwork Reducti	on Act Notice, see instructions.		Form 886 8	Rev 4-2009)

Form 8868	3 (Rev 4-2009)			Page 2	
• If you a	are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and chec	k this box	···	<u>► X</u>	
Note. Only	complete Part II if you have already been granted an automatic 3-month extension on a previ	ously filed	Form 8868		
• If you a	are filing for an Automatic 3-Month Extension, complete only Part I (on page 1)				
Part II	Additional (Not Automatic) 3-Month Extension of Time. Only file the original	al (no co	pies need	ed).	
	Name of Exempt Organization	T	identification i		
Type or					
print	Max and Anna Levinson Foundation	23-628			
Eda by the	Number, street, and room or suite number. If a P O box, see instructions	For IRS u	se only		
File by the extended due date for	Jeanne Milholland, PC	7			
filing the return See	1554 Camino Amado				
instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions			- (4)	
	Santa Fe, NM 87505	. 3	THE T	· A	
Check type	e of return to be filed (File a separate application for each return).		,,,,,,,,,,,		
Form 9	990 X Form 990-PF Form 1041	-A	∏Fo	orm 6069	
Form 9	990-BL Form 990-T (section 401(a) or 408(a) trust) Form 4720		Fo	orm 8870	
Form 9	990-EZ Form 990-T (trust other than above) Form 5227				
STOP! Do	not complete Part II if you were not already granted an automatic 3-month extension on a pre	viously fil	ed Form 88	68.	
 The boo 	oks are in care of ► Corporate offices	_			
Teleph	one No. ► (505) 995-8802 FAX No ►				
	organization does not have an office or place of business in the United States, check this box	- -		▶ □	
If this i	is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)		1	f this is for the	
whole grou	ıp, check this box ▶ 📗 If it is for part of the group, check this box. ▶ 🔲 and attach a list	with the na	ames and E	INs of all	
members t	the extension is for				
4 I requ	uest an additional 3-month extension of time until $\underline{4/15}$, 20 $\underline{11}$				
5 For c	alendar year $_$ $_$, or other tax year beginning $_$ $6/01$ $_$ $_$, 20_09 , and ending	_5/31_	,	20 _10	
	s tax year is for less than 12 months, check reason Initial return Final return		nge in acco	unting period	
7 State	e in detail why you need the extension <u>Additional time</u> is required to c	compile	informa	ation	
nec	cessary to file a complete and accurate return.				
8a If this	s application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less an	,			
nonre	efundable credits. See instructions		8a \$	7,762.	
b If this	s application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated and leading and provided and provided and estimated and provided and provid	ited tax	á l		
with 1	nents made Include any prior year overpayment allowed as a credit and any amount paid prev Form 8868	iousiy	8b \$	8,000.	
c Balar	nce Due. Subtract line 8b from line 8a Include your payment with this form, or, if required, dep	nosit			
with I	FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See ins	strs	8c \$	0.	
	Signature and Verification	•			
Under penaltie correct, and co	es of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of momplete, and that I am authorized to prepare this form	y knowledge a	ind belief, it is t	rue,	
Signature -	Title ▶ President		Date ►		
BAA	FIFZ0502L 03/11/09		Form 88	68 (Rev 4-2009)	

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