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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning 6/01, 2009, and ending 5/31, 2010

G Check all that apply ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name changeUse the
IRS label
Otherwise,
print
or type.
See Specific
Instructions.Max and Anna Levinson Foundation
PO Box 6309
Santa Fe, NM 87502-6309

A Employer identification number

23-6282844

B Telephone number (see the instructions)

(505) 986-8608

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization. ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, column (c), line 16)

▶ \$ 13,875,891.

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

(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

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

REVENUE

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

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

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

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

b Gross sales price for all assets on line 6a 3,666,529.

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

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit/(loss) (att sch)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

ADMINISTRATIVE EXPENSES

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) See St 1

b Accounting fees (attach sch) See St 2

c Other prof fees (attach sch)

17 Interest

18 Taxes (attach schedule) See Stm 3

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 4

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

25 Contributions, gifts, grants paid Part XV

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

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

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

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)

Beginning of year

End of year

		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	131,106.	24,565.	24,565.
	2 Savings and temporary cash investments			
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U S and state government obligations (attach schedule) Statement 5	4,322,587.	3,483,384.	3,645,274.
	b Investments — corporate stock (attach schedule)			
	c Investments — corporate bonds (attach schedule)			
	11 Investments — land, buildings, and equipment basis			
Less: accumulated depreciation (attach schedule)				
12 Investments — mortgage loans				
13 Investments — other (attach schedule) Statement 6	8,045,210.	8,869,885.	10,145,395.	
14 Land, buildings, and equipment basis 30,833.				
Less: accumulated depreciation (attach schedule) See Stmt 7	30,833.			
15 Other assets (describe See Statement 8)	71,554.	60,657.	60,657.	
16 Total assets (to be completed by all filers — see instructions Also, see page 1, item I)	12,570,457.	12,438,491.	13,875,891.	
LIABILITIES	17 Accounts payable and accrued expenses	1,273.	1,172.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	1,273.	1,172.	
	NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>		
24 Unrestricted		12,569,184.	12,437,319.	
25 Temporarily restricted				
26 Permanently restricted				
Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>				
27 Capital stock, trust principal, or current funds				
28 Paid-in or capital surplus, or land, building, and equipment fund				
29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances (see the instructions)		12,569,184.	12,437,319.	
31 Total liabilities and net assets/fund balances (see the instructions)		12,570,457.	12,438,491.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	12,569,184.
2 Enter amount from Part I, line 27a	2	-131,865.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	12,437,319.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	12,437,319.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)

(b) How acquired
P — Purchase
D — Donation(c) Date acquired
(month, day, year)(d) Date sold
(month, day, year)

1 a See attached statement 10	P	Various	Various
b See attached statement 11	P	Various	Various
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,331,433.		1,344,784.	-13,351.
b 2,335,096.		2,267,277.	67,819.
c			
d			
e			

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

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			-13,351.
b			67,819.
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	54,468.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8 </div>	3	-13,351.

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	569,208.	13,273,067.	0.042884
2007	1,204,802.	16,189,427.	0.074419
2006	2,189,500.	16,365,295.	0.133789
2005	1,061,607.	17,092,179.	0.062111
2004	1,220,705.	17,228,593.	0.070853

2 Total of line 1, column (d)	2	0.384056
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.076811
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	13,109,282.
5 Multiply line 4 by line 3	5	1,006,937.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,881.
7 Add lines 5 and 6	7	1,010,818.
8 Enter qualifying distributions from Part XII, line 4	8	511,955.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instr.)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3 Add lines 1 and 2	3	7,762.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	7,762.
6 Credits/Payments		
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	8,000.
b Exempt foreign organizations – tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d	7	8,000.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	25.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	213.
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax 213. Refunded	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) NM		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses.</i>		X

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Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <u>Levinsonfoundation.org</u>				
14	The books are in care of <u>Corporate offices</u> Telephone no <u>(505) 995-8802</u>			
Located at <u>PO Box 6309 Santa Fe NM</u> ZIP + 4 <u>87502</u>				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	N/A	<input type="checkbox"/>	
and enter the amount of tax-exempt interest received or accrued during the year		<u>15</u>		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here		<input type="checkbox"/>
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		<input type="checkbox"/>
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see the instructions)		<input type="checkbox"/>
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		<input type="checkbox"/>
<u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)		<input type="checkbox"/>
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		<input type="checkbox"/>
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		<input type="checkbox"/>

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

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

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

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

6b X

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 9		102,000.	15,000.	0.

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

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

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE'.

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		

Total number of others receiving over \$50,000 for professional services 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.	
a	Average monthly fair market value of securities	1a 13,144,739.
b	Average of monthly cash balances	1b 103,520.
c	Fair market value of all other assets (see instructions)	1c 60,657.
d	Total (add lines 1a, b, and c)	1d 13,308,916.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.
2	Acquisition indebtedness applicable to line 1 assets	2 0.
3	Subtract line 2 from line 1d	3 13,308,916.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4 199,634.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5 13,109,282.
6	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.)

1	Minimum investment return from Part X, line 6	1 655,464.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 7,762.
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	Distributable amount before adjustments Subtract line 2c from line 1	3 647,702.
4	Recoveries of amounts treated as qualifying distributions	4
5	Add lines 3 and 4	5 647,702.
6	Deduction from distributable amount (see instructions)	6
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7 647,702.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a 511,955.
b	Program-related investments — total from Part IX-B	1b
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2
3	Amounts set aside for specific charitable projects that satisfy the.	
a	Suitability test (prior IRS approval required)	3a
b	Cash distribution test (attach the required schedule)	3b
4	Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4 511,955.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 511,955.

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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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				647,702.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	287,235.			
b From 2005	227,864.			
c From 2006	1,401,307.			
d From 2007	412,671.			
e From 2008				
f Total of lines 3a through e	2,329,077.			
4 Qualifying distributions for 2009 from Part 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)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2009 distributable amount				511,955.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	135,747.			135,747.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,193,330.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	151,488.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	2,041,842.			
10 Analysis of line 9				
a Excess from 2005	227,864.			
b Excess from 2006	1,401,307.			
c Excess from 2007	412,671.			
d Excess from 2008				
e Excess from 2009				

BAA

Form 990-PF (2009)

N/A

(4) Gross investment income

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i> See statement 12		none		275,000.
Total				3a 275,000.
<i>b Approved for future payment</i>				
Total				3b

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	349,029.	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			14	54,468.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				403,497.	
13	Total. Add line 12, columns (b), (d), and (e)					13 403,497.

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

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

[illegible]

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 Income	(c) Adjusted Net Income	(d) Charitable Purposes
Miscellaneous	\$ 260.			\$ 260.
Total	<u>\$ 260.</u>	<u>\$ 0.</u>		<u>\$ 260.</u>

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Tax compliance & monthly reporting	\$ 8,149.	\$ 8,149.		
Total	<u>\$ 8,149.</u>	<u>\$ 8,149.</u>		<u>\$ 0.</u>

Statement 3
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise	\$ 8,000.			
Payroll	8,563.			\$ 8,563.
Total	<u>\$ 16,563.</u>	<u>\$ 0.</u>		<u>\$ 8,563.</u>

Statement 4
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Amortization	\$ 7,258.	\$ 7,258.		
Board Meetings	8,146.			\$ 8,146.
Employee benefits	6,350.			6,350.
Insurance	2,696.			2,696.
Internet	869.			869.
Investment and Bank fees	72,521.			72,521.
Miscellaneous	2,778.			2,778.
Office Supplies	977.			977.
Postage	379.			379.
Storage	441.			441.
Telephone	2,892.			2,892.
Total	<u>\$ 105,307.</u>	<u>\$ 7,258.</u>		<u>\$ 98,049.</u>

Max and Anna Levinson Foundation

23-6282844

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

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

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

	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
<u>Other Publicly Traded Securities</u>			
Corporate Dept Securities	Cost	\$ 1,040,364.	\$ 1,033,296.
Financials	Cost	881,970.	1,043,341.
Mutual Funds	Cost	575,000.	712,148.
Consumer Products	Cost	1,207,131.	1,358,944.
Consumer Discretionary	Cost	701,044.	945,927.
Industrial Products & Services	Cost	893,854.	1,170,513.
Industrial Materials	Cost	304,121.	352,588.
Information Technology	Cost	1,297,935.	1,340,787.
Health Care	Cost	994,186.	1,189,725.
Energy	Cost	777,088.	778,600.
Money Market	Cost	138,778.	138,778.
Utilities	Cost	58,414.	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>	<u>Basis</u>	<u>Accum. Deprec.</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Furniture and Fixtures	\$ 30,833.	\$ 30,833.	\$ 0.	\$ 0.
Total	\$ 30,833.	\$ 30,833.	\$ 0.	\$ 0.

Max and Anna Levinson Foundation

23-6282844

Statement 8
Form 990-PF, Part II, Line 15
Other Assets

	<u>Book Value</u>	<u>Fair Market Value</u>
A/R Employee	\$ 665.	\$ 665.
Accrued Interest	59,992.	59,992.
Total	\$ 60,657.	\$ 60,657.

Statement 9
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted</u>	<u>Compensation</u>	<u>Contribution to EBP & DC</u>	<u>Expense Account/Other</u>
Ed Levinson PO Box 237 Mill Valley, CA 94942	Director 2.00	\$ 0.	\$ 0.	\$ 0.
Charlotte Talberth PO Box 6309 Santa Fe, NM 87502-6309	President 40.00	102,000.	15,000.	0.
Gordon Levinson 7337 Corte Tomillo Carlsbad, CA 92009	Director 2.00	0.	0.	0.
Peter Gabel 386 Elizabeth St. San Francisco, CA 94114	Director 2.00	0.	0.	0.
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.
Carol Doroshow 8246 4th Ave., NE Seattle, WA 98115	Secretary 2.00	0.	0.	0.
Total		\$ 102,000.	\$ 15,000.	\$ 0.

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

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
100000. DELAWARE ST 4.125%	01/13/2009	06/11/2009	98,298.65	99,477.68	-1,179.03
75000. TEXAS ST 5.000%					
10/01/26					
100000. FED HOME LN BK CONS DISC	02/12/2009	06/24/2009	77,461.67	78,399.45	-937.78
12/22/09					
100000. FED HOME LN BK CONS DISC	12/29/2008	08/11/2009	99,331.15	99,208.93	122.22
12/22/09					
3000. WEATHERFORD INTERNATIONAL LT	12/29/2008	08/19/2009	99,427.15	99,208.92	218.23
200000. FED HOME LN BKS 1.625%	06/10/2009	09/03/2009	59,830.63	66,650.82	-6,820.19
100. JOHNSON CONTROLS INC	02/12/2009	09/09/2009	202,289.47	199,876.00	2,413.47
100000. FED HOME LN BKS 1.625%	01/05/2009	10/22/2009	2,662.49	1,933.11	729.38
200000. FED HOME LN BKS 1.625%	02/12/2009	10/29/2009	101,213.43	99,938.00	1,275.43
100000. FLORIDA ST BRD ED PU 4.750%	02/27/2009	12/09/2009	202,670.00	199,642.08	3,027.92
100000. FED HOME LN BKS 1.625%	01/13/2009	12/11/2009	102,748.87	99,584.08	3,164.79
5300. SCHWAB CHARLES CORP NEW COM	02/27/2009	01/06/2010	101,026.63	99,821.04	1,205.59
1500. NOKIA AB ADR	VAR	02/09/2010	92,551.54	95,798.34	-3,246.80
1900. CAMERON INTL CORP	VAR	04/27/2010	18,588.26	20,377.09	-1,788.83
6. Southside Bancshares	04/08/2010	04/29/2010	73,184.97	84,722.45	-11,537.48
	9/26/2008	6/11/2009	148.17	145.50	2.67
Totals			1,331,433.08	1,344,783.51	(13,350.43)

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

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
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
700. GENERAL MILLS INC	05/14/2007	06/10/2009	38,313.56	42,131.72	-3,818.16
100000. FED HOME LN BKS 5.250%	06/13/2007	06/12/2009	100,000.00	99,845.03	154.97
39.27 GNMA POOL #567570 6.500%	04/09/2002	06/15/2009	39.27	39.59	-0.32
3/15/32					
84.85 GNMA POOL #567597 6.500%	07/19/2002	06/15/2009	84.85	87.58	-2.73
4/15/32					
2533.53 GNMA POOL #781776 6.000%	07/20/2004	06/15/2009	2,533.53	2,606.77	-73.24
6299.95 GNMA POOL #658132 6.000%	12/11/2006	06/15/2009	6,299.95	6,402.32	-102.37
400. 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	3,190.73	4,941.03	-1,750.30
1200. EMERSON ELECTRIC CO.	VAR	07/08/2009	37,031.76	51,379.28	-14,347.52
900. 3M CO	VAR	07/08/2009	52,938.14	74,012.65	-21,074.51
2100.6 GNMA POOL #567570 6.500%	04/09/2002	07/15/2009	2,100.60	2,117.67	-17.07
100.18 GNMA POOL #567597 6.500%	07/19/2002	07/15/2009	100.18	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
4830.13 GNMA POOL #658132 6.000%	12/11/2006	07/15/2009	4,830.13	4,908.62	-78.49
1600. COLGATE-PALMOLIVE COMPANY	10/06/2004	07/24/2009	119,608.26	71,516.37	48,091.89
300. MEDTRONIC, INC.	06/12/2001	07/31/2009	10,631.63	13,254.90	-2,623.27
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%	04/09/2002	08/15/2009	34.94	35.22	-0.28
3/15/32					
85.94 GNMA POOL #567597 6.500%	07/19/2002	08/15/2009	85.94	88.71	-2.77
4/15/32					
1523.86 GNMA POOL #781776 6.000%	07/20/2004	08/15/2009	1,523.86	1,567.91	-44.05
3710.03 GNMA POOL #658132 6.000%	12/11/2006	08/15/2009	3,710.03	3,770.32	-60.29
38.39 GNMA POOL #567570 6.500%	04/09/2002	09/15/2009	38.39	38.70	-0.31
3/15/32					
88.16 GNMA POOL #567597 6.500%	07/19/2002	09/15/2009	88.16	91.00	-2.84
4/15/32					
1374.91 GNMA POOL #781776 6.000%	07/20/2004	09/15/2009	1,374.91	1,414.65	-39.74
3562.23 GNMA POOL #658132 6.000%	12/11/2006	09/15/2009	3,562.23	3,620.12	-57.89
Totals					

JSA
9F0970 2 000

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

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
900. JOHNSON & JOHNSON	VAR	09/18/2009	54,724.76	47,347.45	7,377.31
100000. FED HOME LN BKS 3.750%	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
1766.46 GNMA POOL #781776 6.000%	07/20/2004	10/15/2009	1,766.46	1,817.52	-51.06
3156.49 GNMA POOL #658132 6.000%	12/11/2006	10/15/2009	3,156.49	3,207.78	-51.29
100. JOHNSON CONTROLS INC	04/21/2008	10/22/2009	2,662.49	3,532.10	-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%					
4/15/32	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	-48.93
3852.36 GNMA POOL #658132 6.000%	12/11/2006	11/15/2009	3,852.36	3,914.96	-62.60
1300. ADOBE SYS INC	10/30/2008	12/01/2009	46,608.43	35,110.08	11,498.35
35.84 GNMA POOL #567570 6.500%					
3/15/32	04/09/2002	12/15/2009	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	2,609.61	-41.73
1500. NOVARTIS AG	08/08/2008	01/07/2010	77,976.84	86,729.98	-8,753.14
500000. FED HOME LN BKS 3.750%	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%					
3/15/32	04/09/2002	01/15/2010	37.66	37.97	-0.31
88.53 GNMA POOL #567597 6.500%					
4/15/32	07/19/2002	01/15/2010	88.53	91.38	-2.85
2714.17 GNMA POOL #781776 6.000%	07/20/2004	01/15/2010	2,714.17	2,792.63	-78.46
2884.19 GNMA POOL #658132 6.000%	12/11/2006	01/15/2010	2,884.19	2,931.06	-46.87
300. COLGATE-PALMOLIVE COMPANY	10/06/2004	01/29/2010	24,062.93	13,409.32	10,653.61
2200. ADOBE SYS INC	10/30/2008	02/01/2010	71,107.17	59,417.05	11,690.12
Totals					

USA
SF0970 2 000

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

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Actors Theatre of San Francisco</u> 855 Bush Street San Francisco CA 94108	General Operating Support	1000	5967	6/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>ProNica Inc.</u> 130 19th Ave. SE St. FL 33705	Casa Materna	3000	5968	6/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Foundation for Exhibition of Photography</u> 4027 Zenith Ave. South Minneapolis MN 55410	Robert Bergman exhibit	4000	5971	6/27/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Africa Yoga Project</u> POB 69 Woodstock NY 12498	Circus featuring African youth	3000	5966	7/5/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>American Forest Alliance</u> 11 Salem Hill Road Weaverville NC 28787	Opposition to mountain top removal	3000	5977	7/9/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Hagar Education for Equality</u> POB 3369 Beer Sheva Israel	Bilingual kindergarten	2000	5978	7/9/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>The Art Barge</u> POB 1266 Amagansett NY 11930	Kids art program	500	5979	7/9/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Avon</u> 29167 Quail Run Agoura Hills CA 91301	walk for breast cancer	500	5982	7/15/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>James Lick School PTA</u> 31 Bennington Street San Francisco CA 94110	Michelle Obama Edible Schoolyard Garden.	3000	5983	7/16/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Hostelling International</u> 425 Divisadero San Francisco CA 94117	mural project	6850	5985	7/23/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>MindFreedom International</u> POB 11284 Eugene OR 97440	mental health support	5000	5987	7/28/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Vallecitos Mountain Ranch</u> PO Box 3160 Taos NM 87571	Retreat scholarship fund	2,500	5984	7/16/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>The Ruckus Society</u> POB 28741 Oakland CA 94604	Climate Conference	10000	5993	7/31/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Hickman Friends Senior Community</u> 400 N. Walnut St. West Chester PA 19380	Resident Assistance Fund	10,000	5994	7/31/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Kindred Spirits Animal Sanctuary</u> 3749-A Hwy 14 Santa fe NM 87508	general support	1,000	5995	8/3/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Chaminade College Preparatory</u> 10210 Oakdale Ave. Chattanooga TN 37403	Scholarship fund	3,500	5998	8/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Encinitas Union School District</u> 3330 Calle Barcelona Carlsbad CA 92009	Mission Estancia	3,000	6000	8/17/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>MADD-San Diego County</u> 938 South Andreasen Dr. #M Escondido CA 92029	general support	5000	6005	9/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Mission Estancia PTA</u> 3330 Calle Barcelona Carlsbad CA 92009	general Support	3000	6006	9/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Diegueno Middle School</u> 2150 Village Park way Encinitas CA 92024	Fall fundraiser	500	6007	9/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Institute for Policy Studies</u> 1601 Connecticut Avenue NW Washington DC 20009		2500	6008	9/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Foundation for Exhibition of Photography</u> 4027 Zenith Ave. South Minneapolis MN 55410	Robert Bergman exhibit	2000	6014	9/22/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Education and</u> 1991 Ludwig Santa Rosa CA 95407	to create green jobs	3000	6018	10/2/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Arizona Rivers</u> 1639 W. Roma Ave. Phoenix AZ 85006	General Support	5000	6020	10/7/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Roots of Israel</u> 724 Eastern Pkwy. Brooklyn NY 11213	general support	18,000	6021	10/13/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Pawsitive Teams</u> 12357 Lomica Dr. San Diego CA 92128	general support	6000	6022	10/13/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Blue Canyon Productions</u> P.O. Box 6622 Santa Fe NM 87502	Production and distribution of educational videos	600	6026	10/31/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>New Mexico Environmental Law Center</u> 1405 Luisa Street Santa Fe NM 87505		5000	6033	11/09/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Santa Fe Watershed Association</u> 1413 Second Street Santa Fe NM 87505	general support	5000	6034	11/21/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Public Benefits Attorneys</u> 580 Howard St. #303 San Francisco CA 94105	legal representation for disabled clients	10,000	6035	11/21/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Hickman Friends Senior Community</u> 400 N. Walnut St. West Chester PA 19380	Resident Assistance Fund	10,000	6040	12/3/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Blue Canyon Productions</u> P.O. Box 6622 Santa Fe NM 87502	Educational video trailer	450.	6041	12/6/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Taos Jewish Center</u> 1335 Gusdorf Rd. #R Taos NM 87571	Core Support	5000	6042	12/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Herocare</u> 8695 College Parkway, #219 Fort Meyers FL 33919	resources for wounded servicemen and women	3000	6043	12/8/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Taos County Economic Development Corporation</u> P.O. Box 1389 Taos NM 87571	Construction Development Program	11,300	6044	12/9/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Taos County Economic Development Corporation</u> P.O. Box 1389 Taos NM 87571	Construction Development Program	11,300	6046	12/31/2009

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Oxfam America</u> POB 1211 Albert Lea MN 56007	Humanitarian Response: Haiti	6,500	6052	1/14/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>New West Media</u> 42 West San Francisco Santa Fe NM 87501	film about mental illness	2000	6057	1/30/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Taos County Economic Development Corporation</u> P.O. Box 1389 Taos NM 87571	Construction Development Program	20000	6055	1/25/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Oxfam America</u> POB 1211 Albert Lea MN 56007	Humanitarian Response: Haiti	4000	6056	1/26/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Media Island International</u> Box 7204 Olympia WA 98507	Youth climate organizing	8000	6059	2/1/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Blue Canyon Productions</u> P.O. Box 6622 Santa Fe NM 87502	general support	500	6064	2/3/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Actors Theatre of San Francisco</u> 855 Bush Street San Francisco CA 94108	General Operating Support	3000	6067	2/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Education and</u> 1991 Ludwig Santa Rosa CA 95407	to create green jobs	3000	6066	2/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>American Cancer Society</u> 1710 Webster St. Oakland CA 94612	general support	2,500	6073	3/4/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Amigos De Las Americas</u> 5618 Star Lane Houston TX 77057	Community service program	1,500	6079	3/22/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Encinitas Unified School District</u> 3330 Calle Barcelona Carlsbad CA 92009	General Support	3,000	6080	3/22/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>WNYC Radiolab</u> 160 Varick Street New York, NY 10014	Radiolab believes your ears are a portal to another world.	1500		3/24/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>California Institute for Yiddish Culture and Language</u> 333 Washington Blvd. #118 Marina del CA 90292	Initiatives include collecting, restoring, and cataloging books	2000	6081	3/25/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Institute for Policy Studies</u> 1601 Connecticut Avenue NW Washington DC 20009	Book about Capitalism	20000	6083	4/1/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>The Ruckus Society</u> PO Box 28741 Oakland CA 94604	Funding for core programs.	2000	6087	4/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Hickman Friends Senior Community</u> 400 N. Walnut St. West Chester PA 19380	Resident Assistance Fund	15,000	6075	4/28/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Vallecitos Mountain Ranch</u> PO Box 3160 Taos NM 87571	Retreat scholarship fund	5000	5679	5/2/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>New West Media</u> 42 West San Francisco Santa Fe NM 87501	film about mental illness	6000	6094	5/11/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Institute for Labor and Mental Health</u> 2342 Shattuck Berkeley CA 94704	general support	1000	6097	5/22/2010

Total	<u>\$275,000.</u>
	=====

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns.*

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization	Employer identification number
	Max and Anna Levinson Foundation	23-6282844
	Number, street, and room or suite number. If a P.O. box, see instructions.	
	PO Box 6309	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	Santa Fe, NM 87502-6309	

Check type of return to be filed (file a separate application for each return)

- | | | |
|---|--|------------------------------------|
| <input type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation) | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (section 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

- The books are in the care of ▶ Corporate offices

Telephone No ▶ (505) 995-8802

FAX No. ▶

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 1/15, 20 11, to file the exempt organization return for the organization named above. The extension is for the organization's return for

- ▶ ☐ calendar year 20__ or
 ▶ ☒ tax year beginning 6/01, 20 09, and ending 5/31, 20 10

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	7,762.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	8,000.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions**BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev 4-2009)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you 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 (no copies needed).

Type or print File by the extended due date for filing the return. See instructions	Name of Exempt Organization	Employer identification number For IRS use only
	Max and Anna Levinson Foundation	
	Number, street, and room or suite number. If a P.O. box, see instructions	
	Jeanne Milholland, PC 1554 Camino Amado	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	Santa Fe, NM 87505	

Check type of return to be filed (File a separate application for each return):

- | | | | |
|--------------------------------------|--|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990 | <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (section 401(a) or 408(a) trust) | <input type="checkbox"/> Form 4720 | <input type="checkbox"/> Form 8870 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 5227 | |

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in care of ☒ **Corporate offices**
Telephone No. ☒ (505) 995-8802 FAX No. ☐
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 4 I request an additional 3-month extension of time until 4/15, 20 11
- 5 For calendar year 2010, or other tax year beginning 6/01, 20 09, and ending 5/31, 20 10
- 6 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension Additional time is required to compile information necessary to file a complete and accurate return.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a \$	7,762.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b \$	8,000.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instrs	8c \$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☐ Title ☒ **President** Date ☐