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

2010

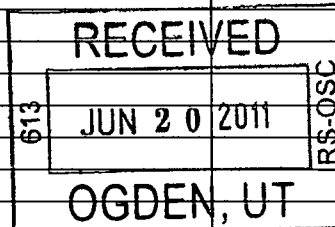
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2010, or tax year beginning , and ending

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

Name of foundation LEWIN FAMILY FOUNDATION		A Employer identification number 02-0691130
Number and street (or P.O. box number if mail is not delivered to street address) P. O. BOX 921	Room/suite	B Telephone number N/A
City or town, state, and ZIP code ORANGE, CT 06477		C If exemption application is pending, check here ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 6149362.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
(Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		39882.		N/A	
2 Check ☐ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		114.	114.		STATEMENT 1
4 Dividends and interest from securities		125527.	125527.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		67152.			
b Gross sales price for all assets on line 6a		3395521.			
7 Capital gain net income (from Part IV, line 2)			67152.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		232675.	192793.		
13 Compensation of officers, directors, trustees, etc		50000.	0.		50000.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		2100.	2100.		0.
c Other professional fees					
17 Interest					
18 Taxes		3825.	0.		3825.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		58181.	57976.		205.
24 Total operating and administrative expenses. Add lines 13 through 23		114106.	60076.		54030.
25 Contributions, gifts, grants paid		245000.			245000.
26 Total expenses and disbursements. Add lines 24 and 25		359106.	60076.		299030.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-126431.			
b Net investment income (if negative, enter -0-)			132717.		
c Adjusted net income (if negative, enter -0-)				N/A	



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		9600.	16576.	16576.
	2	Savings and temporary cash investments		1655247.	338565.	338565.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock				
	c	Investments - corporate bonds				
Liabilities	11	Investments - land, buildings, and equipment basis ▶				
		Less: accumulated depreciation ▶				
	12	Investments - mortgage loans				
	13	Investments - other STMT 6	4135844.	5794221.	5794221.	
	14	Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation ▶				
	15	Other assets (describe ▶)				
	16	Total assets (to be completed by all filers)	5800691.	6149362.	6149362.	
	17	Accounts payable and accrued expenses				
	18	Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☒ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted	5800691.	6149362.		
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances	5800691.	6149362.			
31	Total liabilities and net assets/fund balances	5800691.	6149362.			

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	5800691.
2	Enter amount from Part I, line 27a	2	-126431.
3	Other increases not included in line 2 (itemize) ▶ UNREALIZED HOLDING GAIN	3	475102.
4	Add lines 1, 2, and 3	4	6149362.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	6149362.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SCHEDULE ATTACHED		P	VARIOUS	VARIOUS
b SCHEDULE ATTACHED		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 2325330.		2246439.	78891.
b 1070191.		1081930.	-11739.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			78891.
b			-11739.
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	67152.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	269739.	5438799.	.049595
2008	386732.	6283362.	.061549
2007	383010.	7361051.	.052032
2006	270611.	7012464.	.038590
2005	0.	5007874.	.000000

2 Total of line 1, column (d)	2	.201766
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	.040353
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	5885401.
5 Multiply line 4 by line 3	5	237494.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1327.
7 Add lines 5 and 6	7	238821.
8 Enter qualifying distributions from Part XII, line 4 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.	8	299030.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	1327.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	1327.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	1327.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	1150.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments:		6c	
a 2010 estimated tax payments and 2009 overpayment credited to 2010		6d	
b Exempt foreign organizations - tax withheld at source		7	1150.
c Tax paid with application for extension of time to file (Form 8868)		8	2.
d Backup withholding erroneously withheld		9	179.
7 Total credits and payments. Add lines 6a through 6d		10	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		11	
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 the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax ☐ Refunded ☐			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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.		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? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a 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?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ CT		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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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? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>LEVITSKY & BERNEY, P. C.</u> Telephone no. ► <u>203-389-5371</u> Located at ► <u>100 BRADLEY ROAD, WOODRIDGE, CT</u> ZIP+4 ► <u>06525</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 <u>N/A</u>			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	<u>N/A</u>	1b
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 2010?		1c
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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If "Yes," list the years ►	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	<u>N/A</u>	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2010 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 2010)	<u>N/A</u>	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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 2010?		4b

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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)? ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? **N/A**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** ☐ Yes ☒ No

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A** ☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SUSAN LEWIN 221 MULBERRY LANE ORANGE, CT 06477	PRESIDENT/DIRECTOR 40.00	50000.	0.	0.
CLEMENT LEWIN 221 MULBERRY LANE ORANGE, CT 06477	V. P./TREASURER/DIRECTOR 0.00	0.	0.	0.
JENNIFER W. HONIGMANN 15 CHATHAM LANE BLUE BELL, PA 19422	DIRECTOR 0.00	0.	0.	0.

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

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

Total number of other employees paid over \$50,000 **0**

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	5975026.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5975026.
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	5975026.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	89625.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5885401.
6	Minimum investment return. Enter 5% of line 5	6	294270.

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	294270.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	1327.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1327.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	292943.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	292943.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	292943.

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	299030.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	299030.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	1327.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	297703.

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 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				292943.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007	24742.			
d From 2008	73284.			
e From 2009				
f Total of lines 3a through e	98026.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$ 299030.				
a Applied to 2009, 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 2010 distributable amount				292943.
e Remaining amount distributed out of corpus	6087.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	104113.			
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 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	104113.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007	24742.			
c Excess from 2008	73284.			
d Excess from 2009				
e Excess from 2010	6087.			

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2010	(b) 2009	(c) 2008	(d) 2007	

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

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

c Any submission deadlines:

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

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

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

OMB No 1545-0047

2010

Name of the organization

Employer identification number

LEWIN FAMILY FOUNDATION

02-0691130

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

Name of organization

Employer identification number

LEWIN FAMILY FOUNDATION

02-0691130

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	H. F. GRUSS CLUT 221 MULBERRY LANE ORANGE, CT 06477	\$ 39882.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

LEWIN FAMILY FOUNDATION

02-0691130

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization	Employer identification number
LEWIN FAMILY FOUNDATION	02-0691130

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

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.

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization LEWIN FAMILY FOUNDATION	Employer identification number 02-0691130
	Number, street, and room or suite no. If a P.O. box, see instructions. P.O. BOX 921	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. ORANGE, CT 06477	

Enter the Return code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

• The books are in the care of ► _____

Telephone No. ► _____ 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.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 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 10 or
 ► ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____.

2 If the tax year entered in line 1 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	\$	0
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.	3b	\$	0
c	Balance due. Subtract line 3b from line 3a. Include your payment with this form, 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.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
CITIZENS BANK	114.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	114.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
VARIOUS	125527.	0.	125527.
TOTAL TO FM 990-PF, PART I, LN 4	125527.	0.	125527.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	2100.	2100.		0.
TO FORM 990-PF, PG 1, LN 16B	2100.	2100.		0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL	3825.	0.		3825.
TO FORM 990-PF, PG 1, LN 18	3825.	0.		3825.

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT MANAGEMENT	57976.	57976.		0.	
OFFICE EXPENSE	205.	0.		205.	
TO FORM 990-PF, PG 1, LN 23	58181.	57976.		205.	

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
EQUITY AND DEBT SECURITIES	FMV	5794221.	5794221.	
TOTAL TO FORM 990-PF, PART II, LINE 13		5794221.	5794221.	

2010 Tax Information Statement

Account Number: 711179010
Recipient's Tax ID Number: XX-XXX1130
Payer's Federal ID Number: 39-1186267
Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
LEWIN FAMILY FOUNDATION INC
ATTN: SUSAN LEWIN
221 MULBERRY LANE
ORANGE, CT 06477

Payer's Name and Address:
MARSHALL & ILSLEY TRUST CO NA
P.O. BOX 2977
MILWAUKEE, WI 53201

2010 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B								
80 0000	88579Y101	3M CO COM	09/14/2010	10/27/2010	7,119.07	6,775.03	344.04	0.00
181 0000	002824100	ABBOTT LABS COM	04/02/2009	03/22/2010	9,776.66	8,278.02	1,498.64	0.00
140 0000	018490102	ALLERGAN INC COM	VARIOUS	10/27/2010	10,023.83	9,161.04	862.79	0.00
80 0000	018490102	ALLERGAN INC COM	03/25/2010	11/03/2010	5,818.62	5,160.08	658.54	0.00
190 0000	021441100	ALTERA CORP COM	02/09/2010	10/27/2010	5,855.70	4,188.80	1,666.90	0.00
50 0000	023135106	AMAZON COM INC COM	07/23/2010	10/27/2010	8,372.35	5,528.88	2,843.47	0.00
40 0000	023135106	AMAZON COM INC COM	07/23/2010	10/28/2010	6,640.80	4,423.10	2,217.70	0.00
50 0000	023135106	AMAZON COM INC COM	VARIOUS	11/03/2010	8,175.46	5,523.11	2,652.35	0.00
120 0000	023135106	AMAZON COM INC COM	07/01/2010	11/10/2010	20,513.71	13,252.02	7,261.69	0.00
203 0000	032511107	ANADARKO PETE CORP COM	VARIOUS	03/17/2010	14,876.76	8,860.05	6,016.71	0.00
500 0000	039483102	ARCHER DANIELS MIDLAND CO COM	09/27/2010	10/13/2010	16,648.26	16,285.40	362.86	0.00
58644.9280	04315J845	ARTIO INTERNATIONAL EQUITY FUND II CLASS A	VARIOUS	08/25/2010	621,636.24	640,000.00	-18,363.76	0.00
139 0000	064058100	BANK NEW YORK MELLON CORP COM	VARIOUS	03/12/2010	4,136.52	3,756.43	380.09	0.00
25 0000	064058100	BANK NEW YORK MELLON CORP COM	12/04/2009	05/05/2010	776.27	673.30	102.97	0.00
969 0000	060505104	BANK OF AMERICA CORP COM	VARIOUS	03/11/2010	16,695.66	9,540.99	7,154.67	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2010 Tax Information Statement

Account Number: 711179010
 Recipient's Tax ID Number: XX-XXX1130
 Payer's Federal ID Number: 39-1186267
 Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
 LEWIN FAMILY FOUNDATION INC
 ATTN: SUSAN LEWIN
 221 MULBERRY LANE
 ORANGE, CT 06477

Payer's Name and Address:
 MARSHALL & ILSLEY TRUST CO NA
 P.O. BOX 2977
 MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
330.0000	071813109	BAXTER INTL INC	VARIOUS	04/22/2010	16,445.53	19,519.74	-3,074.21	0.00
310.0000	071813109	BAXTER INTL INC	VARIOUS	04/23/2010	15,492.29	15,788.64	-296.35	0.00
162.0000	165167107	CHESAPEAKE ENERGY CORP COM	10/30/2009	06/02/2010	3,678.50	3,915.54	-237.04	0.00
233.0000	172967101	CITIGROUP INC COM	11/03/2009	02/16/2010	764.23	922.68	-158.45	0.00
1273.0000	172967101	CITIGROUP INC COM	VARIOUS	03/25/2010	5,453.08	4,150.08	1,303.00	0.00
390.0000	192446102	COGNIZANT TECH SOLUTIONS CRP COM	VARIOUS	03/08/2010	19,635.35	12,389.26	7,246.09	0.00
60.0000	194162103	COLGATE PALMOLIVE CO COM	06/09/2010	10/27/2010	4,526.32	4,734.21	-207.89	0.00
240.0000	194162103	COLGATE PALMOLIVE CO COM	VARIOUS	10/28/2010	17,975.21	18,795.46	-820.25	0.00
318.0000	205887102	CONAGRA INC COM	03/23/2009	03/17/2010	8,169.25	4,864.00	3,305.25	0.00
388.0000	219350105	CORNING INC	10/30/2009	03/18/2010	7,496.06	5,729.05	1,767.01	0.00
194.0000	126650100	CVS CORP	06/09/2009	01/22/2010	6,501.48	5,994.35	507.13	0.00
500.0000	24702R101	DELL INC COM	VARIOUS	04/14/2010	8,205.81	7,216.80	989.01	0.00
1000.0000	24702R101	DELL INC COM	VARIOUS	10/05/2010	13,307.87	14,176.01	-868.14	0.00
135.0000	25659T107	DOLBY LABORATORIES INC COM	VARIOUS	05/04/2010	8,955.56	5,628.38	3,327.18	0.00
35.0000	25659T107	DOLBY LABORATORIES INC COM	08/13/2009	05/05/2010	2,277.08	1,406.38	870.70	0.00
45.0000	25659T107	DOLBY LABORATORIES INC COM	08/13/2009	05/13/2010	3,047.71	1,808.20	1,239.51	0.00
100.0000	25659T107	DOLBY LABORATORIES INC COM	VARIOUS	05/17/2010	6,367.42	4,015.19	2,352.23	0.00
65.0000	25659T107	DOLBY LABORATORIES INC COM	08/18/2009	05/18/2010	4,151.55	2,608.82	1,542.73	0.00
110.0000	25659T107	DOLBY LABORATORIES INC COM	VARIOUS	08/10/2010	6,699.58	4,407.82	2,291.76	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2010 Tax Information Statement

Recipient's Name and Address:
LEWIN FAMILY FOUNDATION INC
ATTN: SUSAN LEWIN
221 MULBERRY LANE
ORANGE, CT 06477

Account Number: 711179010
Recipient's Tax ID Number: XX-XXX1130
Payer's Federal ID Number: 39-1186267
(414)815-3632

Payer's Name and Address:
MARSHALL & ILSLEY TRUST CO NA
P.O. BOX 2977
MILWAUKEE, WI 53201

☐ 2nd TIN notice

☐ Corrected

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
60.0000	25659T107	DOLBY LABORATORIES INC COM	09/02/2009	08/23/2010	3,344.90	2,229.77	1,115.13	0.00
130.0000	25659T107	DOLBY LABORATORIES INC COM	09/02/2009	08/25/2010	6,896.22	4,831.16	2,065.06	0.00
180.0000	302130109	EXPEDITORS INTL WASH INC COM	04/15/2010	10/19/2010	8,672.25	7,147.06	1,525.19	0.00
160.0000	302130109	EXPEDITORS INTL WASH INC COM	VARIOUS	10/20/2010	7,852.47	6,233.29	1,619.18	0.00
240.0000	302130109	EXPEDITORS INTL WASH INC COM	VARIOUS	10/27/2010	11,726.20	9,251.12	2,475.08	0.00
110.0000	302130109	EXPEDITORS INTL WASH INC COM	VARIOUS	12/09/2010	6,190.95	4,137.74	2,053.21	0.00
300.0000	30231G102	EXXON MOBIL CORP	07/13/2010	10/22/2010	19,837.46	17,799.57	2,037.89	0.00
90.0000	315616102	F5 NETWORKS INC COM	VARIOUS	10/27/2010	10,388.52	6,298.73	4,089.79	0.00
100.0000	315616102	F5 NETWORKS INC COM	VARIOUS	10/27/2010	11,797.89	7,086.55	4,711.34	0.00
50.0000	315616102	F5 NETWORKS INC COM	05/04/2010	12/03/2010	6,966.63	3,475.98	3,490.65	0.00
500.0000	35906A108	FRONTIER COMMUNICATIONS CORP COM	12/15/2009	06/04/2010	4,132.87	3,729.95	402.92	0.00
26000.0000	36962GZY3	GENERAL ELEC CAP CORP MEDIUM TERM NTS TRANCHE # TR 00575 5.45% DTD	VARIOUS	02/01/2010	27,637.12	26,934.70	702.42	0.00
140.0000	372917104	GENZYME CORP COM	01/07/2010	04/08/2010	7,200.16	7,020.45	179.71	0.00
226.0000	406216101	HALLIBURTON CO COM	03/31/2009	01/12/2010	7,550.56	3,570.75	3,979.81	0.00
100.0000	406216101	HALLIBURTON CO COM	04/29/2010	05/11/2010	2,852.40	3,019.02	-166.62	0.00
400.0000	406216101	HALLIBURTON CO COM	04/29/2010	09/28/2010	12,891.78	12,076.08	815.70	0.00
388.0000	42809H107	HESS CORP COM	VARIOUS	03/22/2010	23,589.17	21,375.61	2,213.56	0.00
112.0000	458140100	INTEL CORP COM	06/18/2009	02/02/2010	2,200.77	1,795.36	405.41	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



2010 Tax Information Statement

Account Number: 711179010
 Recipient's Tax ID Number: XX-XXX1130
 Payer's Federal ID Number: 39-1186267
 Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
 LEWIN FAMILY FOUNDATION INC
 ATTN: SUSAN LEWIN
 221 MULBERRY LANE
 ORANGE, CT 06477

Payer's Name and Address:
 MARSHALL & ILSLEY TRUST CO NA
 P.O. BOX 2977
 MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
100.0000	459200101	INTERNATIONAL BUSINESS MACHS COM	09/27/2010	10/07/2010	13,805.34	13,500.40	304.94	0.00
360.0000	G491BT108	INVESCO LTD	04/29/2010	10/27/2010	7,988.26	8,419.90	-431.64	0.00
225.0000	46625H100	J P MORGAN CHASE & CO COM	06/05/2009	05/21/2010	8,968.34	7,943.99	1,024.35	0.00
140.0000	48203R104	JUNIPER NETWORKS INC COM	10/13/2010	10/27/2010	4,472.92	4,435.05	37.87	0.00
250.0000	501044101	KROGER CO COM	VARIOUS	02/22/2010	5,536.17	5,373.26	162.91	0.00
274.0000	501044101	KROGER CO COM	VARIOUS	04/15/2010	6,370.91	5,864.80	506.11	0.00
139.0000	532457108	LILLY ELI & CO	10/28/2009	03/11/2010	4,963.14	4,745.92	217.22	0.00
443.0000	532457108	LILLY ELI & CO	10/28/2009	05/19/2010	14,924.99	15,125.48	-200.49	0.00
115.0000	580135101	MCDONALDS CORP COM	05/17/2010	10/27/2010	8,947.99	8,052.54	895.45	0.00
194.0000	61945A107	MOSAIC CO COM	11/24/2009	03/24/2010	11,639.75	10,437.57	1,202.18	0.00
200.0000	61945A107	MOSAIC CO COM	05/03/2010	07/29/2010	9,490.69	10,036.04	-545.35	0.00
110.0000	628530107	MYLAN LABS INC COM	03/30/2009	03/17/2010	2,431.38	1,424.04	1,007.34	0.00
220.0000	641069406	NESTLE S A SPONSORED ADR REPSTG REG SH	02/08/2010	03/29/2010	11,083.21	10,091.97	991.24	0.00
200.0000	64110D104	NETAPP INC COM	03/04/2010	08/24/2010	7,941.10	6,281.68	1,659.42	0.00
465.0000	681904108	OMNICARE INC COM	VARIOUS	02/02/2010	11,709.90	11,770.61	-60.71	0.00
500.0000	68389X105	ORACLE CORP COM	06/28/2010	08/16/2010	11,368.85	11,281.45	87.40	0.00
90.0000	74005P104	PRAXAIR INC COM	VARIOUS	10/27/2010	8,166.46	7,062.10	1,104.36	0.00
30.0000	741503403	PRICELINE COM INC COM NEW	03/25/2010	08/06/2010	8,816.47	7,651.37	1,165.10	0.00

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2010 Tax Information Statement

Page 11 of 35
Ref: KXP

Account Number: 711179010
 Recipient's Tax ID Number: XX-XXX1130
 Payer's Federal ID Number: 39-1186267
 Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
 LEWIN FAMILY FOUNDATION INC
 ATTN: SUSAN LEWIN
 221 MULBERRY LANE
 ORANGE, CT 06477

Payer's Name and Address:
 MARSHALL & ILSLEY TRUST CO NA
 P.O. BOX 2977
 MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
40.0000	741503403	PRICELINE COM INC COM NEW	03/25/2010	08/26/2010	11,667.75	10,201.83	1,465.92	0.00
32.0000	741503403	PRICELINE COM INC COM NEW	VARIOUS	10/27/2010	11,973.23	6,747.23	5,226.00	0.00
150.0000	747525103	QUALCOMM INC COM	07/23/2009	02/08/2010	5,669.33	6,991.83	-1,322.50	0.00
90.0000	774341101	ROCKWELL COLLINS INC COM	04/23/2010	09/14/2010	5,220.41	5,874.19	-653.78	0.00
70.0000	774341101	ROCKWELL COLLINS INC COM	VARIOUS	09/15/2010	4,036.15	4,529.57	-493.42	0.00
70.0000	774341101	ROCKWELL COLLINS INC COM	VARIOUS	10/27/2010	4,227.92	4,512.49	-284.57	0.00
290.0000	774341101	ROCKWELL COLLINS INC COM	VARIOUS	12/03/2010	16,794.83	18,339.56	-1,544.73	0.00
46388.5220	780905733	ROYCE VALUE SERVICE	VARIOUS	06/14/2010	475,779.24	478,490.00	-2,710.76	0.00
350.0000	78572M105	SABMILLER PLC SPONS ADR	VARIOUS	10/21/2010	11,447.67	10,294.54	1,153.13	0.00
160.0000	78572M105	SABMILLER PLC SPONS ADR	08/25/2010	10/27/2010	5,020.71	4,620.99	399.72	0.00
164.0000	78390X101	SAIC INC COM	03/03/2010	03/22/2010	3,155.64	3,161.35	-5.71	0.00
160.0000	808857108	SCHLUMBERGER LTD COM	04/15/2010	10/27/2010	10,895.81	10,758.09	137.72	0.00
17000.0000	832248AM0	SMITHFIELD FOODS INC SR NT 7.00% DTD 08/04/2004 DUE 08/01/2011	11/03/2009	10/14/2010	17,603.50	16,426.25	1,177.25	0.00
250.0000	790849103	ST JUDE MED INC COM	VARIOUS	01/19/2010	9,681.35	9,734.69	-53.34	0.00
205.0000	790849103	ST JUDE MED INC COM	02/05/2009	01/20/2010	7,879.21	7,571.18	308.03	0.00
175.0000	790849103	ST JUDE MED INC COM	02/05/2009	01/21/2010	6,650.58	6,463.21	187.37	0.00
220.0000	857477103	STATE STR CORP COM	06/05/2009	04/06/2010	10,232.48	10,564.68	-332.20	0.00
190.0000	87612E106	TARGET CORP COM	04/08/2010	07/23/2010	9,738.98	10,629.14	-890.16	0.00
200.0000	87612E106	TARGET CORP COM	VARIOUS	10/27/2010	10,405.82	10,231.58	174.24	0.00

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2010 Tax Information Statement

Account Number: 711179010
 Recipient's Tax ID Number: XX-XXX1130
 Payer's Federal ID Number: 39-1186267
 Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
 LEWIN FAMILY FOUNDATION INC
 ATTN: SUSAN LEWIN
 221 MULBERRY LANE
 ORANGE, CT 06477

Payer's Name and Address:
 MARSHALL & ILSLEY TRUST CO NA
 P.O. BOX 2977
 MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
151 0000	887317303	TIME WARNER INC COM NEW	VARIOUS	03/17/2010	4,714.69	3,220.77	1,493.92	0.00
388 0000	91529Y106	UNUMPROVIDENT CORP COM	01/26/2010	03/23/2010	9,330.00	7,791.27	1,538.73	0.00
193 0000	91913Y100	VALERO ENERGY COM	10/30/2009	01/26/2010	3,660.14	3,497.16	162.98	0.00
665 0000	91913Y100	VALERO ENERGY COM	VARIOUS	03/18/2010	13,731.41	11,972.66	1,758.75	0.00
27906.9770	922907845	VANGUARD HIGH-YIELD TAX-EXEMPT FUND-ADM #5044	09/01/2010	09/14/2010	298,604.65	300,000.00	-1,395.35	0.00
388 0000	92343V104	VERIZON COMMUNICATIONS COM	05/29/2009	02/02/2010	11,496.29	11,243.66	252.63	0.00
10 0000	92826C839	VISA INC COM CL A	03/25/2010	05/14/2010	778.79	903.59	-124.80	0.00
300 0000	92826C839	VISA INC COM CL A	VARIOUS	05/25/2010	21,764.60	26,280.21	-4,515.61	0.00
82 0000	984332106	YAHOO INC COM	11/09/2009	03/22/2010	1,339.72	1,321.40	18.32	0.00
500 0000	984332106	YAHOO INC COM	03/25/2010	04/06/2010	8,353.61	8,127.25	226.36	0.00
1000 0000	984332106	YAHOO INC COM	VARIOUS	07/06/2010	14,064.66	16,110.25	-2,045.59	0.00
Total Short Term Sales Reported on 1099-B						2,203,598.54	78,890.61	0.00
Long Term 15% Sales Reported on 1099-B								
300 0000	00724F101	ADOBE SYS INC COM	01/03/2008	10/27/2010	8,402.85	12,533.01	-4,130.16	0.00
185 0000	032511107	ANADARKO PETE CORP COM	02/26/2007	03/17/2010	13,557.64	7,567.55	5,990.09	0.00
62 0000	037833100	APPLE COMPUTER INC COM	06/09/2009	10/27/2010	19,006.39	8,882.99	10,123.40	0.00
500 0000	00206R102	AT&T INC COM	VARIOUS	08/17/2010	13,499.81	14,511.89	-1,012.08	0.00
100 0000	067383109	BARD C R INC	08/21/2008	05/07/2010	8,309.88	9,485.62	-1,175.74	0.00

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2010 Tax Information Statement

Page 13 of 35
Ref: KXP

Recipient's Name and Address:
LEWIN FAMILY FOUNDATION INC
ATTN: SUSAN LEWIN
221 MULBERRY LANE
ORANGE, CT 06477

Account Number: 711179010
Recipient's Tax ID Number: XX-XXX1130
Payer's Federal ID Number: 39-1186267
Questions? (414)815-3632

Payer's Name and Address:
MARSHALL & ILSLEY TRUST CO NA
P.O. BOX 2977
MILWAUKEE, WI 53201

☐ Corrected ☐ 2nd TIN notice

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
180.0000	067383109	BARD C R INC	VARIOUS	06/25/2010	14,127.10	16,941.59	-2,814.49	0.00
215.0000	067383109	BARD C R INC	VARIOUS	07/01/2010	16,339.85	19,316.24	-2,976.39	0.00
200.0000	067901108	BARRICK GOLD CORP COM	VARIOUS	09/01/2010	9,323.84	5,667.60	3,656.24	0.00
400.0000	151020104	CELGENE CORP COM	09/08/2008	10/27/2010	23,483.60	26,509.88	-3,026.28	0.00
194.0000	15135U109	CENOVUS ENERGY INC COM	12/14/2006	02/01/2010	4,694.74	4,960.60	-265.86	0.00
18.0000	165167107	CHESAPEAKE ENERGY CORP COM	03/28/2008	05/20/2010	383.59	823.50	-439.91	0.00
208.0000	165167107	CHESAPEAKE ENERGY CORP COM	VARIOUS	06/02/2010	4,723.01	6,814.98	-2,091.97	0.00
82.0000	17275R102	CISCO SYS INC COM	VARIOUS	05/12/2010	2,184.67	1,952.73	231.94	0.00
440.0000	17275R102	CISCO SYS INC COM	03/13/2007	10/27/2010	10,159.42	11,399.96	-1,240.54	0.00
1730.0000	17275R102	CISCO SYS INC COM	VARIOUS	11/16/2010	33,795.14	38,196.07	-4,400.93	0.00
564.0000	172967101	CITIGROUP INC COM	VARIOUS	02/16/2010	1,849.89	5,947.61	-4,097.72	0.00
140.0000	192446102	COGNIZANT TECH SOLUTIONS CRP COM	05/05/2009	08/24/2010	8,121.27	3,799.46	4,321.81	0.00
230.0000	192446102	COGNIZANT TECH SOLUTIONS CRP COM	05/05/2009	10/27/2010	15,195.84	6,241.97	8,953.87	0.00
110.0000	192446102	COGNIZANT TECH SOLUTIONS CRP COM	VARIOUS	11/03/2010	7,070.00	2,976.93	4,093.07	0.00
439.0000	20030N101	COMCAST CORP CL A	VARIOUS	03/18/2010	7,739.03	10,771.35	-3,032.32	0.00
110.0000	205887102	CONAGRA INC COM	06/30/2008	02/05/2010	2,495.87	2,125.10	370.77	0.00
348.0000	205887102	CONAGRA INC COM	VARIOUS	03/17/2010	8,939.93	5,191.00	3,748.93	0.00
400.0000	126650100	CVS CORP	04/18/2007	01/21/2010	13,404.86	13,820.00	-415.14	0.00

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2010 Tax Information Statement

Account Number: 711179010
 Recipient's Tax ID Number: XX-XXX1130
 Payer's Federal ID Number: 39-1186267
 Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address:
 MARSHALL & ILSLEY TRUST CO NA
 P.O. BOX 2977
 MILWAUKEE, WI 53201

Recipient's Name and Address:
 LEWIN FAMILY FOUNDATION INC
 ATTN: SUSAN LEWIN
 221 MULBERRY LANE
 ORANGE, CT 06477

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
140.0000	25659T107	DOLBY LABORATORIES INC COM	VARIOUS	07/01/2010	8,581.71	5,199.75	3,381.96	0.00
150.0000	25659T107	DOLBY LABORATORIES INC COM	06/25/2009	08/02/2010	9,423.86	5,516.40	3,907.46	0.00
40.0000	25659T107	DOLBY LABORATORIES INC COM	06/25/2009	08/10/2010	2,436.21	1,471.04	965.17	0.00
50.0000	25659T107	DOLBY LABORATORIES INC COM	08/19/2009	08/23/2010	2,787.42	2,002.84	784.58	0.00
82.0000	268648102	E M C CORP MASS COM	09/02/2008	04/05/2010	1,522.91	1,262.56	260.35	0.00
194.0000	292505104	ENCANA CORP COM	12/14/2006	05/19/2010	5,874.22	5,267.45	606.77	0.00
13000.0000	36962GZY3	GENERAL ELEC CAP CORP MEDIUM TERM NTS TRANCHE # TR 00575 5.45% DTD	09/26/2008	02/01/2010	13,818.56	12,262.90	1,555.66	0.00
278.0000	369604103	GENERAL ELEC CO COM	VARIOUS	03/15/2010	4,772.86	8,971.66	-4,198.80	0.00
386.0000	369604103	GENERAL ELEC CO COM	10/02/2008	03/17/2010	7,025.53	8,588.50	-1,562.97	0.00
70.0000	36866T103	GEN-PROBE INC NEW COM	10/31/2007	09/10/2010	3,260.50	4,866.65	-1,606.15	0.00
85.0000	36866T103	GEN-PROBE INC NEW COM	10/31/2007	09/15/2010	4,075.34	5,909.51	-1,834.17	0.00
85.0000	36866T103	GEN-PROBE INC NEW COM	10/31/2007	09/16/2010	4,045.02	5,909.50	-1,864.48	0.00
65.0000	36866T103	GEN-PROBE INC NEW COM	VARIOUS	09/24/2010	3,101.40	4,431.55	-1,330.15	0.00
59.0000	36866T103	GEN-PROBE INC NEW COM	11/07/2007	09/27/2010	2,794.48	3,972.86	-1,178.38	0.00
66.0000	36866T103	GEN-PROBE INC NEW COM	11/07/2007	09/28/2010	3,147.35	4,444.22	-1,296.87	0.00
230.0000	36866T103	GEN-PROBE INC NEW COM	VARIOUS	10/04/2010	11,097.95	14,985.30	-3,887.35	0.00
70.0000	36866T103	GEN-PROBE INC NEW COM	12/20/2007	10/18/2010	3,376.01	4,432.38	-1,056.37	0.00
90.0000	36866T103	GEN-PROBE INC NEW COM	12/20/2007	10/19/2010	4,314.39	5,698.78	-1,384.39	0.00

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2010 Tax Information Statement

Page 15 of 35
Ref: KXP

Account Number: 711179010
 Recipient's Tax ID Number: XX-XXX1130
 Payer's Federal ID Number: 39-1186267
 Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
 LEWIN FAMILY FOUNDATION INC
 ATTN: SUSAN LEWIN
 221 MULBERRY LANE
 ORANGE, CT 06477

Payer's Name and Address:
 MARSHALL & ILSLEY TRUST CO NA
 P.O. BOX 2977
 MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
65.0000	36886T103	GEN-PROBE INC NEW COM	12/20/2007	10/20/2010	3,105.67	4,115.78	-1,010.11	0.00
660.0000	372917104	GENZYME CORP COM	VARIOUS	03/25/2010	34,195.15	41,867.13	-7,671.98	0.00
430.0000	372917104	GENZYME CORP COM	03/13/2007	04/06/2010	22,393.55	25,936.83	-3,543.28	0.00
95.0000	372917104	GENZYME CORP COM	03/13/2007	04/08/2010	4,885.82	5,730.23	-844.41	0.00
27.0000	38259P508	GOOGLE INC CL A	VARIOUS	10/27/2010	16,599.85	14,223.96	2,375.89	0.00
226.0000	458140100	INTEL CORP COM	07/17/2008	02/02/2010	4,440.85	4,795.79	-354.94	0.00
110.0000	46120E602	INTUITIVE SURGICAL INC COM NEW	VARIOUS	04/16/2010	40,892.28	13,570.13	27,322.15	0.00
2.0000	46625H100	J P MORGAN CHASE & CO COM	09/27/2007	05/21/2010	79.72	92.33	-12.61	0.00
226.0000	501044101	KROGER CO COM	04/13/2009	04/15/2010	5,254.84	4,585.20	669.64	0.00
111.0000	571748102	MARSH & MC LENNAN COS INC COM	VARIOUS	02/04/2010	2,455.84	3,122.81	-666.97	0.00
165.0000	571748102	MARSH & MC LENNAN COS INC COM	07/31/2006	05/19/2010	3,709.13	4,466.42	-757.29	0.00
500.0000	571748102	MARSH & MC LENNAN COS INC COM	VARIOUS	12/02/2010	13,004.77	13,235.53	-230.76	0.00
190.0000	61166W101	MONSANTO CO NEW COM	VARIOUS	04/08/2010	13,106.83	21,517.65	-8,410.82	0.00
350.0000	61166W101	MONSANTO CO NEW COM	VARIOUS	04/15/2010	23,137.72	36,685.14	-13,527.42	0.00
310.0000	61166W101	MONSANTO CO NEW COM	VARIOUS	05/07/2010	18,286.56	21,350.45	-3,063.89	0.00
860.0000	628530107	MYLAN LABS INC COM	VARIOUS	03/17/2010	19,008.93	5,792.80	13,216.13	0.00
740.0000	641069406	NESTLE S A SPONSORED ADR REPSTG REG SH	VARIOUS	01/06/2010	35,180.10	32,809.97	2,370.13	0.00

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2010 Tax Information Statement

Page 16 of 35
Ref: KXP

Account Number: 711179010
Recipient's Tax ID Number: XX-XXX1130
Payer's Federal ID Number: 39-1186267
Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address:
MARSHALL & ILSLEY TRUST CO NA
P.O. BOX 2977
MILWAUKEE, WI 53201

Recipient's Name and Address:
LEWIN FAMILY FOUNDATION INC
ATTN: SUSAN LEWIN
221 MULBERRY LANE
ORANGE, CT 06477

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
300.0000	641069406	NESTLE S A SPONSORED ADR REPSTG REG SH	VARIOUS	03/19/2010	15,211.18	12,597.48	2,613.70	0.00
90.0000	641069406	NESTLE S A SPONSORED ADR REPSTG REG SH	10/14/2008	03/29/2010	4,534.04	3,554.54	979.50	0.00
270.0000	64110D104	NETAPP INC COM	10/20/2009	10/27/2010	14,200.40	7,768.84	6,431.56	0.00
150.0000	64110D104	NETAPP INC COM	VARIOUS	11/24/2010	7,677.31	4,218.41	3,458.90	0.00
88.0000	651639106	NEWMONT MNG CORP COM	09/26/2007	05/03/2010	4,935.69	3,947.72	987.97	0.00
290.0000	665859104	NORTHERN TR CORP	VARIOUS	06/24/2010	13,849.84	16,271.13	-2,421.29	0.00
190.0000	670100205	NOVO-NORDISK A S ADR	09/08/2008	04/27/2010	15,395.96	10,118.98	5,276.98	0.00
140.0000	670100205	NOVO-NORDISK A S ADR	09/08/2008	05/20/2010	10,557.78	7,456.09	3,101.69	0.00
190.0000	670100205	NOVO-NORDISK A S ADR	VARIOUS	05/28/2010	14,800.80	9,785.91	5,014.89	0.00
50.0000	670100205	NOVO-NORDISK A S ADR	02/27/2009	10/27/2010	5,014.41	2,442.47	2,571.94	0.00
130.0000	713448108	PEPSICO INC COM	VARIOUS	10/27/2010	8,306.85	7,964.19	342.66	0.00
215.0000	717124101	PHARMACEUTICAL PROD DEV INC COM	12/18/2008	02/09/2010	4,528.68	5,912.22	-1,383.54	0.00
340.0000	717124101	PHARMACEUTICAL PROD DEV INC COM	VARIOUS	02/11/2010	7,276.75	8,878.51	-1,601.76	0.00
110.0000	717124101	PHARMACEUTICAL PROD DEV INC COM	01/16/2009	02/12/2010	2,364.53	2,839.81	-475.28	0.00
890.0000	747525103	QUALCOMM INC COM	VARIOUS	02/08/2010	33,638.01	46,577.25	-12,939.24	0.00
350.0000	808513105	SCHWAB CHARLES CORP NEW COM	10/14/2008	04/06/2010	6,698.15	7,533.82	-835.67	0.00
770.0000	808513105	SCHWAB CHARLES CORP NEW COM	VARIOUS	06/07/2010	12,450.99	16,311.33	-3,860.34	0.00
380.0000	808513105	SCHWAB CHARLES CORP NEW COM	VARIOUS	06/14/2010	6,063.13	7,677.47	-1,614.34	0.00

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2010 Tax Information Statement

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Ref: KXP

Recipient's Name and Address:
LEWIN FAMILY FOUNDATION INC
ATTN: SUSAN LEWIN
221 MULBERRY LANE
ORANGE, CT 06477

Account Number: 711179010
Recipient's Tax ID Number: XX-XXX1130
Payer's Federal ID Number: 39-1186267
Questions? (414)815-3632
☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address:
MARSHALL & ILSLEY TRUST CO NA
P.O. BOX 2977
MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
470 0000	808513105	SCHWAB CHARLES CORP NEW COM	03/26/2009	06/15/2010	7,465.44	7,379.84	85.60	0.00
325 0000	784117103	SEI INVESTMENTS COMPANY	03/13/2007	03/26/2010	6,988.26	9,554.93	-2,566.67	0.00
120 0000	784117103	SEI INVESTMENTS COMPANY	03/13/2007	03/30/2010	2,615.10	3,527.97	-912.87	0.00
255 0000	784117103	SEI INVESTMENTS COMPANY	03/13/2007	03/31/2010	5,542.35	7,496.95	-1,954.60	0.00
190 0000	784117103	SEI INVESTMENTS COMPANY	07/25/2007	04/28/2010	4,232.66	5,366.15	-1,133.49	0.00
110 0000	784117103	SEI INVESTMENTS COMPANY	07/25/2007	04/29/2010	2,493.54	3,106.72	-613.18	0.00
260 0000	784117103	SEI INVESTMENTS COMPANY	VARIOUS	06/04/2010	5,537.91	7,241.55	-1,703.64	0.00
115 0000	784117103	SEI INVESTMENTS COMPANY	09/24/2007	07/22/2010	2,294.35	3,014.25	-719.90	0.00
230 0000	784117103	SEI INVESTMENTS COMPANY	09/24/2007	07/26/2010	4,585.82	6,028.51	-1,442.69	0.00
355 0000	784117103	SEI INVESTMENTS COMPANY	VARIOUS	07/27/2010	7,085.56	8,918.57	-1,833.01	0.00
195 0000	784117103	SEI INVESTMENTS COMPANY	05/14/2008	07/28/2010	3,810.02	4,668.01	-857.99	0.00
435 0000	784117103	SEI INVESTMENTS COMPANY	05/14/2008	07/29/2010	8,445.55	10,413.24	-1,967.69	0.00
19000 0000	832248AM0	SMITHFIELD FOODS INC SR NT 7 00% DTD 08/04/2004 DUE 08/01/2011	VARIOUS	09/22/2010	19,641.25	14,287.50	5,353.75	0.00
3000 0000	832248AM0	SMITHFIELD FOODS INC SR NT 7 00% DTD 08/04/2004 DUE 08/01/2011	11/13/2008	10/14/2010	3,106.50	2,122.50	984.00	0.00
190 0000	857477103	STATE STR CORP COM	VARIOUS	10/27/2010	7,765.16	8,716.64	-951.48	0.00
130 0000	863667101	STRYKER CORP COM	10/02/2007	05/07/2010	7,089.96	9,218.51	-2,128.55	0.00
300 0000	863667101	STRYKER CORP COM	VARIOUS	07/22/2010	14,057.22	19,715.50	-5,658.28	0.00
75 0000	863667101	STRYKER CORP COM	03/13/2007	10/27/2010	3,763.43	4,793.12	-1,029.69	0.00

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2010 Tax Information Statement

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Recipient's Name and Address:

LEWIN FAMILY FOUNDATION INC
ATTN: SUSAN LEWIN
221 MULBERRY LANE
ORANGE, CT 06477

711179010

XX-XXX1130

39-1186267

(414)815-3632

☐ 2nd TIN notice

Account Number:

Recipient's Tax ID Number:

Payer's Federal ID Number:

Questions?

☐ Corrected

Payer's Name and Address:

MARSHALL & ILSLEY TRUST CO NA
P.O. BOX 2977
MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
375.0000	863667101	STRYKER CORP COM	03/13/2007	11/01/2010	18,543.84	23,965.57	-5,421.73	0.00
130.0000	863667101	STRYKER CORP COM	03/13/2007	11/02/2010	6,470.32	8,308.07	-1,837.75	0.00
110.0000	87612E106	TARGET CORP COM	12/15/2009	12/21/2010	6,515.94	5,248.06	1,267.88	0.00
237.0000	887317303	TIME WARNER INC COM NEW	VARIOUS	03/17/2010	7,399.88	5,872.33	1,527.55	0.00
160.0000	92220P105	VARIAN MEDICAL SYSTEMS INC	09/30/2008	05/07/2010	8,184.64	9,136.73	-952.09	0.00
190.0000	92220P105	VARIAN MEDICAL SYSTEMS INC	09/30/2008	10/27/2010	11,485.30	10,849.88	635.42	0.00
120.0000	92220P105	VARIAN MEDICAL SYSTEMS INC	VARIOUS	12/07/2010	8,199.66	5,934.87	2,264.79	0.00
100.0000	92220P105	VARIAN MEDICAL SYSTEMS INC	10/14/2008	12/09/2010	6,730.20	4,563.35	2,166.85	0.00
100.0000	92220P105	VARIAN MEDICAL SYSTEMS INC	VARIOUS	12/21/2010	7,030.26	4,351.72	2,678.54	0.00
290.0000	92826C839	VISA INC COM CL A	VARIOUS	05/14/2010	22,584.79	15,278.51	7,306.28	0.00
82.0000	931142103	WAL MART STORES INC COM	04/22/2009	05/05/2010	4,452.27	4,041.52	410.75	0.00
1540.0000	959802109	WESTERN UN CO COM	VARIOUS	02/08/2010	25,028.84	38,268.08	-13,239.24	0.00
1065.0000	959802109	WESTERN UN CO COM	VARIOUS	02/09/2010	17,088.01	18,724.23	-1,636.22	0.00
Total Long Term 15% Sales Reported on 1099-B						1,067,479.18	-11,739.10	0.00
Long Term 15% Wash Sales Reported on 1099-B								
57.0000	594918104	MICROSOFT CORP COM	10/05/2007	02/22/2010	1,643.85	1,701.59	-57.74	0.00
500.0000	594918104	MICROSOFT CORP COM	VARIOUS	10/18/2010	12,807.53	14,465.61	-1,658.08	0.00
Total Long Term 15% Wash Sales Reported on 1099-B						16,167.20	-1,715.82	0.00
Short Term Wash Sales Reported on 1099-B								

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Payer's Name and Address:
MARSHALL & ILSLEY TRUST CO NA
P.O. BOX 2977
MILWAUKEE, WI 53201

Number of shares	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
500.0000	064058100	BANK NEW YORK MELLON CORP COM	VARIOUS	07/01/2010	12,288.39	13,387.21	-1,098.82	0.00
200.0000	12541W209	C H ROBINSON WORLDWIDE INC COM NEW	10/19/2010	10/27/2010	14,236.75	14,334.86	-98.11	0.00
30.0000	46120E602	INTUITIVE SURGICAL INC COM NEW	05/07/2010	10/27/2010	7,746.16	9,780.09	-2,033.93	0.00
160.0000	641069406	NESTLE S A SPONSORED ADR REPSTG REG SH	10/21/2010	10/27/2010	8,569.45	8,809.14	-239.69	0.00
Total Short Term Wash Sales Reported on 1099-B						46,311.30	-3,470.55	0.00

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Grant recipient

Agency on Aging of South Central CT
Alzheimer's Association
American Circle for the Reform Club
American Liver Foundation
American Lung Association
Arthur Ashe Youth Tennis & Education
ASPCA
Camp Sunshine
Can Do Multiple Sclerosis formerly Heuga Center
CAPA and the Shubert Theater
CFGNH - Landes
CFGNH - The Stepping Stones Milestone Fund
Christian Community Action
Christian Community Action
Colorado University Foundation/ Shelton Scholarship Fund
CT Urban Education Fund/St Martin de Porres
Gaylord Hospital
God's Love We Deliver
Hamden Hall Country Day School
Hamden Hall Country Day School
Hamden Hall Country Day School
Hamden Hall Country Day School
Immunization Action Coalition
Jaffa Institute
Jamie A Hulley Arts Foundation
Marrakech - Cuzzocreo
Meals of Marin
Mystic Seaport
New Life Youth and Family Services
Orange Congregational Church
Orange Congregational Church
Orange Congregational Church
Orange Foundation
Orange Foundation
Presbyterian Childrens Village
Quinnipiac University
Rambam (PEF)
Ronald McDonald House Ct
Springside School
Springside School
St Raphael Foundation
St. John Lutheran Church
The Fund for Women and Girls
The Fund for Women and Girls
Vista Vocational and Life Skills Center

WHYY

Womens Health Research at Yale

WSHU

Yale Forestry (Urban Resources Initiative)

Yeshiva University

Charitable Gift Fund

Address	Category	Actual	Receipt
1 Long Wharf Drive, New Haven, CT 06511	Health	10000	Yes
279 New Britain RD., Suite 5, Kensington, CT 06037	Health	500	Yes
470 South Union Street, Alexandria, VA 22314		500	Yes
New England Chapter, 88 Winchester St., Newton, MA 02461	Health	500	Yes
460 Totten Pnd Rd., Suite 400, Waltham, MA 02451	Health	500	Yes
4842 Ridge Ave., Philadelphia, PA 19129	Sport/Education	10000	Yes
424 East 92nd Street, New York, NY 10128	Animals	500	Yes
35 Acadia Road, Casco, ME 04015	Health	5000	Yes
27 Main St, Suite 303, Edwards, CO 81632	Health	500	Yes
247 College Street, New Haven, CT 06510	Arts	5000	Yes
The CFGNH, 70 Audubon St., New Haven, CT 06510	Arts	5000	Yes
The CFGNH, 70 Audubon St., New Haven, CT 06510	Outreach	10000	Yes
168 Davenport Avenue, New Haven, CT 06519	Outreach	1319	
168 Davenport Avenue, New Haven, CT 06519	Outreach	1000	
4740 Walnut Street, Boulder, Co 80301	Education	500	Yes
208 Columbus Ave , New Haven, CT 06519	Education	2000	Yes
PO Box 400, Gaylord Farm Road, Wallingford, CT 06492	Health	10000	Yes
166 Ave of the America's New York, NY 10013	Health/food	500	Yes
1108 Whitney Ave., Hamden, CT 06517	Education	1000	Yes
1108 Whitney Ave , Hamden, CT 06517	Education	2000	
1108 Whitney Ave , Hamden, CT 06517	Education	21900	Yes
1108 Whitney Ave , Hamden, CT 06517	Annual Fund	3000	Yes
1573 Selby Avenue, Suite 234, St Paul, MN 55104	Health/education	5000	Yes
171-06 76 th Street, Flushing, NY 11366	Education/Outreach	10000	Yes
PO Box 1208, Orange, CT 06477	Arts	5131	Yes
6 Lunar Drive, Woodbridge, CT 06525	Community care	5000	Yes
3095 Lerner Blvd , Suite Q, San Raphael, CA 94901	Health/Welfare	10000	Yes
75 Greenmanville Ave , PO Box 6000, Mystic, CT 06355	Culture/education	10000	Yes
585 Freeman School Rd, Schwenksville, PA 19473	Education	1000	Yes
205 Meetinghouse Lane, Orange, CT 06477	Outreach	11000	Yes
205 Meetinghouse Lane, Orange, CT 06477	Outreach	1000	Yes
205 Meetinghouse Lane, Orange, CT 06477	Interfaith match	1100	Yes
PO Box 623, Orange, CT 06477	Community	2500	Yes
PO Box 623, Orange, CT 06477	Community	3000	Yes
452 South Roberts Road, Rosemont, PA 19010	Child Welfare	3000	Yes
Mail Stop AH-DVP, 275 Mount Carmel Ave., Hamden, CT 06518	Sport/Education	2000	Yes
317 Madison Ave, Suite #607, New York, NY 10017-5379	Health	25000	Yes
501 George Street, New Haven, CT 06511	Health	1000	Yes
8000 Cherokee Street, Philadelphia, PA 19118	Education	1500	Yes
8000 Cherokee Street, Philadelphia, PA 19118	Education	6000	Yes
1450 Chapel Street, New Haven, CT 06511	health	500	Yes
1802 Skippack Pike, Centre Square, PA 09422	Music	2000	
The CFGNH, 70 Audubon St , New Haven, CT 06510	Community	7500	Yes
The CFGNH, 70 Audubon St , New Haven, CT 06510		550	Yes
105 Bradley Rd , Madison, CT 06443	Education	5000	Yes

Independence Mall West, 150 North Sixth Street, Philadelphia, PA 19106
135 College Street, Suite 220, New Haven, CT 06510
Sacred Heart University, 5151 Park Ave., Fairfield, CT 06825
URI, 205 Prospect St , New Haven, CT 06511

Arts	1000	Yes
Education/Health	500	Yes
Arts	15000	Yes
Outreach	6000	Yes
	5000	

Fidelity Investments

7500 Yes

Total given

245000