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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

2010Department 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 2010, or tax year beginning 6/01, 2010, and ending 5/31, 2011

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

I Fair market value of all assets at end of year (from Part II, column (c), line 16)

\$ 15,390,966.

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)

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

2 Ck ☒ 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 3,478,442.

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...

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch) See St 1

c Other prof fees (attach sch)

17 Interest

18 Taxes (attach schedule) (see instr) See Stm 2

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule) See Statement 3

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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ADMINISTRATIVE AND OPERATING EXPENSES

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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	24,565.	104,238.	104,238.
	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 4	3,483,384.	3,898,079.	4,033,202.
	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 5	8,869,885.	8,173,662.	11,316,159.	
14 Land, buildings, and equipment: basis 30,833.				
Less: accumulated depreciation (attach schedule) See Stmt. 6. 30,833.				
15 Other assets (describe See Statement 7)	60,657.	41,605.	41,605.	
16 Total assets (to be completed by all filers – see instructions Also, see page 1, item I)	12,438,491.	12,217,584.	15,495,204.	
LIABILITIES	17 Accounts payable and accrued expenses	1,172.	10,159.	
	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)	1,172.	10,159.	
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	12,437,319.	12,207,425.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here. <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)	12,437,319.	12,207,425.	
	31 Total liabilities and net assets/fund balances (see the instructions)	12,438,491.	12,217,584.	

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	12,437,319.
2 Enter amount from Part I, line 27a	2	-229,894.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3.	4	12,207,425.
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	12,207,425.

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)
1a 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 614,430.		600,853.	13,577.
b 2,864,012.		2,648,792.	215,220.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(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	
a			13,577.
b			215,220.
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	228,797.
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) (see the instructions) If (loss), enter -0- in Part I, line 8	— []	3	13,577.

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))
2009	511,955.	13,109,282.	0.039053
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
2 Total of line 1, column (d)		2	0.352256
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	0.070451
4 Enter the net value of noncharitable use assets for 2010 from Part X, line 5		4	14,376,989.
5 Multiply line 4 by line 3		5	1,012,873.
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	5,845.
7 Add lines 5 and 6		7	1,018,718.
8 Enter qualifying distributions from Part XII, line 4.		8	799,372.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see 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		1	11,690.
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	11,690.
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	11,690.
6 Credits/Payments.			
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a	11,213.	
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	11,213.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed. See Statement 8	9	481.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII 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 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
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?		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	
8a 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 General Instruction G? <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 2010 or the taxable year beginning in 2010 (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 VIIA 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>Levinsonfoundation.org</u>	13	X	
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			
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?	16	Yes	No
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country <u></u>			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
1 a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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"/>	1b	X
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <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)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>		
3 a 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 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)	3b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

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Form 990-PF (2010)

Part VII 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?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (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		131,167.	22,050.	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 VII 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 D-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 See Statement 10	
	8,502.
2	
3	
4	

Part D-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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Form 990-PF (2010)

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	14,492,517.
b Average of monthly cash balances	1b	61,806.
c Fair market value of all other assets (see instructions)	1c	41,605.
d Total (add lines 1a, b, and c)	1d	14,595,928.
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	14,595,928.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	218,939.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	14,376,989.
6 Minimum investment return. Enter 5% of line 5	6	718,849.

Part IX 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	718,849.
2a Tax on investment income for 2010 from Part VI, line 5	2a	11,690.
b Income tax for 2010. (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	11,690.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	707,159.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	707,159.
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	707,159.

Part XI 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	799,372.
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	799,372.
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	799,372.

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.

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				707,159.
2 Undistributed income, if any, as of the end of 2010:				
a Enter amount for 2009 only			0.	
b Total for prior years: 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005	227,864.			
b From 2006	1,401,307.			
c From 2007	412,671.			
d From 2008				
e From 2009				
f Total of lines 3a through e	2,041,842.			
4 Qualifying distributions for 2010 from Part XII, line 4: \$ 799,372.				
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				707,159.
e Remaining amount distributed out of corpus	92,213.			
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	2,134,055.			
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 instructions			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) (see instructions).	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	227,864.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	1,906,191.			
10 Analysis of line 9				
a Excess from 2006	1,401,307.			
b Excess from 2007	412,671.			
c Excess from 2008				
d Excess from 2009				
e Excess from 2010	92,213.			

Part XIV 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</i> Paid during the year See statement 12		none		474,650.
Total				474,650.
<i>b</i> Approved for future payment				
Total				

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

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

- (1) Cash**

- (2) Other assets.**

b Other transactions:

- (1) Sales of assets to a noncharitable exempt organization**

- (2) Purchases of assets from a noncharitable exempt organization.**

- (3) Rental of facilities, equipment, or other assets.**

- #### (4) Reimbursement arrangements

- (5) Loans or loan guarantees. .

- (5) Performance of services or membership or fundraising solicitations.**

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If 'Yes,' complete the following schedule.

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

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

**Sign
Here**

Charles D. Smith
Signature of officer or trustee

2.23.12
Date

President

**Paid
Preparer
Use Only**

Print/Type preparer's name

Jeanne Milholland

Preparer's signature _____

Mike

Date _____

22/17/12

Check if		if
self-employed		

PTIN

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Firm's name

Jeanne Milholland, PC

1554 Camino Amado

Firm's address

Santa Fe, NM 87505

Firm's EIN ▶ N/A

Phone no (505) 986-8608

BAA

Form 990-PF (2010)

Max and Anna Levinson Foundation

23-6282844

Statement 1
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	\$ 9,345.	\$ 9,345.		
Total	\$ 9,345.	\$ 9,345.		\$ 0.

Statement 2
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise	\$ 15,000.			
Payroll	9,158.			\$ 9,158.
Total	\$ 24,158.	\$ 0.		\$ 9,158.

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Board Meetings	\$ 48,014.			\$ 48,014.
Insurance	2,660.			2,660.
Internet	956.			956.
Investment and Bank fees	66,348.			66,348.
Miscellaneous	2,483.			2,483.
Office Supplies	1,514.			1,514.
Postage	1,021.			1,021.
Special projects	8,502.			8,502.
Storage	441.			441.
Telephone	3,227.			3,227.
Total	\$ 135,166.	\$ 0.		\$ 135,166.

Statement 4
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	\$ 3,744,693.	\$ 3,880,318.
		\$ 3,744,693.	\$ 3,880,318.
<u>State/Municipal Obligations</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>

Max and Anna Levinson Foundation

23-6282844

Statement 4 (continued)
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>
State & Municipal Obligations	Cost	\$ 153,386.	\$ 152,885.
		\$ 153,386.	\$ 152,885.
Total		\$ 3,898,079.	\$ 4,033,203.

Statement 5
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	\$ 632,866.	\$ 724,343.
Financials	Cost	883,750.	1,159,678.
Mutual Funds	Cost	575,000.	891,188.
Consumer Products	Cost	983,437.	1,355,224.
Consumer Discretionary	Cost	702,320.	1,035,816.
Industrial Products & Services	Cost	910,057.	1,522,784.
Industrial Materials	Cost	304,121.	472,674.
Information Technology	Cost	1,287,956.	1,584,478.
Health Care	Cost	725,718.	1,061,237.
Energy	Cost	932,340.	1,261,539.
Money Market	Cost	155,348.	155,348.
Utilities	Cost	80,749.	91,849.
Total		\$ 8,173,662.	\$ 11,316,158.

Statement 6
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 7
Form 990-PF, Part II, Line 15
Other Assets

	<u>Book Value</u>	<u>Fair Market Value</u>
Accrued Interest.	\$ 41,605.	\$ 41,605.
Total	<u>\$ 41,605.</u>	<u>\$ 41,605.</u>

Statement 8
Form 990-PF, Part VI, Line 9
Tax Due

Tax Due	\$ 477.
Late Interest	4.
Total	<u>\$ 481.</u>

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	\$ 2,500.	\$ 0.	\$ 0.
Charlotte Talberth PO Box 6309 Santa Fe, NM 87502-6309	President 40	111,167.	22,050.	0.
Gordon Levinson 7337 Corte Tomillo Carlsbad, CA 92009	Director 2	2,500.	0.	0.
Peter Gabel 386 Elizabeth St. San Francisco, CA 94114	Director 2	2,500.	0.	0.
Rachel Krich 2 Schweid Ct. Fair Lawn, NJ 07410	Treasurer 2	2,500.	0.	0.
Robin Beck PO Box 6309 Santa Fe, NM 87502-6309	Vice President 2	2,500.	0.	0.
Julian Levinson 292 Riverside Dr., Apt 4A New York, NY 10025	Director 2	2,500.	0.	0.

Max and Anna Levinson Foundation

23-6282844

Statement 9 (continued)
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>Compen- sation</u>	<u>Contri- bution to EBP & DC</u>	<u>Expense Account/ Other</u>
Suntara Loba PO Box 6309 Santa Fe, NM 87505	Director 2	\$ 2,500.	\$ 0.	\$ 0.
Carol Doroshow 8246 4th Ave., NE Seattle, WA 98115	Secretary 2	2,500.	0.	0.
Total		\$ 131,167.	\$ 22,050.	\$ 0.

Statement 10
Form 990-PF, Part IX-A, Line 1
Summary of Direct Charitable Activities

<u>Direct Charitable Activities</u>	<u>Expenses</u>
The Board of Directors, including Officers, held a meeting to memorialize the passing of a former long-term director, Lynda Levinson. The attendance was approximately 30 people connected with the Board and the Foundation.	\$ 8,502.

MAX & ANNA LEVINSON FNDK 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)					
50000. BP CAPITAL MARKETS 5.250%	11/05/2008	06/14/2010	47,375.00	50,293.56	-2,918.56
11/07/13					
75000. BP CAPITAL MARKETS 5.250%	11/05/2008	06/16/2010	66,374.72	75,440.33	-9,065.61
11/07/13					
125000. BP CAPITAL MARKETS 5.250%	11/05/2008	06/16/2010	112,018.51	125,733.89	-13,715.38
700. SUNTRUST BKS INC	05/08/2009	07/02/2010	15,817.50	14,168.09	1,649.41
4900. ABB LTD	06/01/2009	07/08/2010	90,200.49	83,434.87	6,765.62
1700. OEP RESOURCES INC	04/02/2009	07/21/2010	51,399.21	36,512.71	14,786.50
500000. TREASURY INFL IDX 2.15026%	12/23/2008	08/17/2010	556,178.42	531,932.94	24,245.48
3000. LOWES COS INC	05/26/2009	06/26/2010	62,036.75	58,986.82	3,049.93
4000. BANK OF AMERICA CORPORATION	VAR	06/30/2010	49,854.24	62,102.27	-12,238.03
800. WATERS CORPORATION	11/04/2003	09/01/2010	50,102.25	25,156.03	24,946.22
900. NIKE INC.	10/26/2005	09/02/2010	65,620.89	37,851.93	27,748.96
100. PEPSICO INC	04/20/2005	09/13/2010	6,645.84	5,422.01	1,223.83
300. PROCTER & GAMBLE COMPANY	10/11/2005	05/13/2010	18,185.61	16,873.88	1,311.73
2400. GENERAL MILLS INC	05/14/2007	05/15/2010	87,286.10	72,225.80	15,060.30
300. CONOCOPHILLIPS	09/04/2007	11/16/2010	18,158.98	25,211.55	-7,052.57
500. PRICE T ROWE GROUP INC	05/19/2000	11/16/2010	28,296.41	9,329.63	18,966.78
25. VARIAN MED SYS INC	03/31/2009	12/01/2010	1,680.17	770.67	909.50
2200. MERCK & CO INC NEW	11/18/2009	01/03/2011	80,272.05	77,504.82	2,767.23
150. VARIAN MED SYS INC	03/31/2009	01/03/2011	10,474.93	4,624.00	5,850.93
1500. VISA INC	VAR	01/03/2011	105,878.44	90,333.67	15,544.77
1325. VARIAN MED SYS INC	03/31/2009	01/04/2011	91,795.77	40,845.34	50,950.43
2100. JOHNSON & JOHNSON	VAR	02/11/2011	127,165.82	122,958.85	4,206.97
350000. FED FARM CR BKS 6.000%	06/29/2001	03/07/2011	350,000.00	345,663.56	4,336.44
800. HEWLETT-PACKARD COMPANY	02/29/2008	03/08/2011	34,063.55	38,719.89	-4,656.34
600. MICROSOFT CORPORATION	10/14/2009	03/08/2011	15,522.54	15,607.27	-84.73
450000. FED HOME LN BKS 1.625%	02/27/2009	03/16/2011	450,000.00	449,194.68	805.32
1900. BED BATH & BEYOND INC	07/29/2009	03/17/2011	86,800.50	65,782.11	21,018.39
100. JOHNSON & JOHNSON	05/19/2000	03/17/2011	5,809.01	4,366.00	1,443.01
300. WATERS CORPORATION	11/04/2003	05/05/2011	29,008.25	9,433.51	19,574.74
150000. ABBOTT LABS 5.600%	09/14/2007	05/15/2011	150,000.00	152,211.39	-2,211.39
TOTAL 15% RATE CAPITAL GAINS (LOSSES)			2864011.95	2648792.07	215,219.88

2864011.95

<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	General Support	4,000	6258	3/17/2011

<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	6236	1/14/2011

<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	750	6121	6/16/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>The Front Porch</u> POB 24744 Detroit MI 48224	General Support	1000	6118	6/16/2010

<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	Citizen action trainings	2000	6202	9/21/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>The Serengeti Foundation</u> 19100 Hamilton pool Rd. Dripping TX 78620	Elephant Nature Park/Thailand	5000	6267	5/6/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Universities Allied for Essential Medicines</u> 2625 Alcatraz #180 berkeley CA 94705	low cost medicines	5,000	6266	4/29/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>University Christian Church</u> 3900 Cleveland Ave. San Diego, CA	Memorial Fund	2,500	6181	8/17/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date</u>
Stop Exploitation Now! 15100 SE 38 th St. Bellevue, WA 98006	General Support	\$15,000	6153	7/8/2010

<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	River Festival	5000	6102	6/1/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Sarah Lawrence College</u> 1 Mead Way Bronxville NY 10708	Ray Seidelman Fund for Public Advocacy	5000	6173	8/5/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Seattle Humans Society</u> 13212 SE Eastgate Way Bellevue WA 98005	general support	500	6237	1/14/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Shorefront Jewish Community Council</u> 3049 Brighton 6th Street Brooklyn NY 11235	Food services for immigrants	45,000	6156	7/14/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Spirit Rock Meditation Center</u> 5000 Sir Francis Drake Blvd. Woodacre CA 94973	General Support	3500	6160	7/31/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Spirit Rock Meditation Center</u> 5000 Sir Francis Drake Blvd. Woodacre CA 94973	teaching staff support	5000	6163	7/31/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Taos Coalition to End Homelessness</u> POB 169 Taos, NM 87571	Taos Men's Shelter	5000	6257	3/10/2011

<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> 835 Bush Street San Francisco CA 94108	General Operating Support	1000	6255	3/8/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>AJC Seattle Jewish Film Festival</u> 1402 Third Ave. #405 Seattle WA 98101	festival	10000	6151	7/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Alliance for Education</u> 1859 NW Roundhill Circle Seattle WA 98177	School health clinic	5000	6193	9/13/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Arlene Francis Foundation</u> 386 Elizabeth St. San Francisco CA 94114	Center for Spirit, Art and Politics	23,000	6155	7/12/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Arlene Francis Foundation</u> 386 Elizabeth St. San Francisco CA 94114	Center for Spirit, Art and Politics	6000	6222	12/7/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Bed-Stuy Campaign Against Hunger</u> 2010 Fulton Street Brooklyn NY 11233		2500	6158	2/3/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Beehive Design Collective</u> 1 Elm Street Machias ME 04654	general support	2000	6174	8/5/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Blind Babies Foundation</u> 1814 Franklin Street, 11th Floor Oakland, CA 94612		2500	6269	5/19/2011

<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	1000	6188	9/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Choices In Recovery</u> 733 South Santa Fe Ave. Vista CA 92083	Drug & Alcohol Outreach Program	1,900	6194	9/16/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Choices In Recovery</u> 733 South Santa Fe Ave. Vista CA 92083	Drug & Alcohol Outreach Program	1,900	6207	10/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Choices In Recovery</u> 733 South Santa Fe Ave. Vista CA 92083	Drug & Alcohol Outreach Program	3,000	6217	11/15/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Contemporary Art Institute of Detroit</u> 5141 Rosa Parks Blvd. Detroit MI 48208	general support	5000		6/24/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Crayne Hennessy</u> 8675 Old Santa Fe Trail Santa Fe NM 87505	hepatitis c support forum	3,100	6180	8/16/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Crayne Hennessy</u> 8675 Old Santa Fe Trail Santa Fe NM 87505	hepatitis c support forum	5,000.	0248	2/23/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Curry Without Worrry</u> 416 Hoffman	food program	1000	6191	9/8/2010

<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	1,000	6198	9/28/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Earth Island Institute</u> 2150 Allston Way Berkeley CA 94704	The Borneo Project	10000	6249	3/1/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Earthworks Urban Farm</u> 1264 Meldrum Detroit MI 48207	general support	4000	6119	6/16/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Foundation for the People of Burma</u> 225 Bush #590 San Francisco CA 94104	Humanitarian aid	500	6179	8/10/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Foundation for the People of Burma</u> 225 Bush #590 San Francisco CA 94104	Humanitarian aid	5,250	6208	10/11/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Foundation for the People of Burma</u> 225 Bush #590 San Francisco CA 94104	Humanitarian aid	20,000	6221	12/7/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Friends of Lotan</u> 5545 I Forbes Ave. Pittsburgh PA 15217	general support for eco-kibbutz	1,000	6259	3/25/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Georgia Justice Project</u> 438 Edgewood Ave. Atlanta, GA 30312	Low income representation	500	6225	12/19/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Georgia Street Community Collective</u> 9352 Georgia Street Detroit MI 48213	General Support	4000	6117	6/16/2010

<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	6213	11/3/2010

<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	Community Fund pledge	20,000	6250	3/3/2011

<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	Awards ceremony	3000	6187	9/3/2010

<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	5000	6261	4/11/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Lifelong AIDS Alliance</u> 1017 East Union Street Seattle WA 98122	AIDS services	5,000	6152	7/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Louisiana Disaster Recovery Foundation</u> 4354 S. Sherwood Forest Blvd. Baton Rouge LA 70816	Community support re: BP oil	20,000	6105	6/2/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Louisiana Wildlife & Fisheries Foundation</u> POB 80378 Baton Rouge, LA 70808	Recovery efforts/BP oil disaster	20,000	6106	6/2/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Lupus Fed. of America</u> 500 Old York Road, Suite 110 Jenkintown, PA 19046	Lupus Links golf tournament fundraiser for Lupus research.	10,000	6103	6/2/2010

<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	6192	9/12/2010

<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	Tar sands organizing	2000	6214	11/3/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Mission Estancia</u> 3330 Calle Barcelona Carlsbad CA 92009	Encinitas Education Foundation	1,000	6195	9/20/2010

<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	500	6112	6/9/2010

<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	parent teacher association	500	6196	9/20/2010

<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	parent teacher association	500	6197	9/20/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Mr. B's Espresso</u> POB 15219 Lansing MI	children's programs	1,500		6/24/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
New Israel Fund 1101 14th Street Washington DC 20005	Hagar: coeducation for Jews and Arabs	30000	6154	7/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
New West Media POB 427 Santa Fe NM 87504	website about mental illness	4000	6235	12/7/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
New York Open Center 22 E. 30th Street New York NY 10016		1500	6242	2/3/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
Ohio Citizens Action Education Fund 614 W. Superior Ave. Suite 1200 Cleveland OH 44113	Public opposition to toxics plant	1500	6200	9/21/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
Online Journalism Project 493 Central Ave. New Haven CT 06515	reporting on nanotechnology	10000	6244	2/15/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
Orangutan Foundation International 824 S. Wesley Ave. Los Angeles CA 90049	Orangutan conservation	1000		12/14/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
ProNica Inc. 130 19th Ave. SE St. FL 33705	Casa Materna in Matagalpa	5000	6172	8/5/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
Roots of Israel 724 Eastern Pkwy. Brooklyn NY 11213	general support	8,500	6256	3/10/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>University of San Francisco</u> 2130 Fulton San Francisco CA 94117	Witness to Guantanamo project	50,000	6150	7/8/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>UTIE/Merkavah Torah Institute</u> 1630 Bancroft Way Berkeley CA 94703	general support	500	6189	9/8/2010

<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	1,400	6238	1/14/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>Walden Family Services</u> 6150 Mission Gorge Rd. San Diego CA 92120	family services	500	6268	5/16/2011

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>World Security Institute</u> 1779 Massachusetts Avenue NW, Suite 615 Washington DC 20036	North Korea project per Gay Dillingham	3000	6233	12/16/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>YES!</u> 420 Bronco Road Soquel CA 95073	Youth Leadership Trainings	5000	6201	9/21/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date Paid</u>
<u>YIVO Institute for Jewish Research</u> 15 West 16th St New York NY 10011	Scholarship Assistance for Yiddish Language Program	4,000	6120	6/16/2010

<u>Organization</u>	<u>Purpose</u>	<u>Amount awarded</u>	<u>Check no.</u>	<u>Date</u>
NM Land Conservancy PO Box 6579 Santa Fe, NM 87502	General Support	\$1,000	6164	8/1/2010
Amnesty International 5 Penn Plaza NY, NY 10001	General Support	\$ 250		10/31/2010
Jewish Family Services 3580 Wilshire Blvd Los Angeles, CA 90010	General Support	\$ 500	6215	11/8/2010
The Orangutan Foundation 7 Kent Terrace London, UK	General Support	\$5,000		1/5/2011
ASPCA 424 E. 92nd St. NY, NY 10128	General Support	\$ 500		1/18/2011
American Cancer Society 250 Williams St., NW Atlanta, GA 30303	General Support	\$ 200		5/18/2011
Total		<u>\$ 474,650</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

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	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	

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

04

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 (section 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. ▶ 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.

- 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 12, 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 10, and ending 5/31, 20 11.

- 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	\$	11,690.
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	\$	11,213.
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.		\$	477.

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 Paperwork Reduction Act Notice, see Instructions.Form **8868** (Rev. 1-2011)

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

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	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.	
	Jeanne Milholland, PC 1554 Camino Amado	
File by the extended due date for filing the return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	Santa Fe, NM 87505	

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

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
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 (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

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 **12**.
- 5 For calendar year _____, or other tax year beginning **6/01**, 20 **10**, and ending **5/31**, 20 **11**.
- 6 If the tax year entered in line 5 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 \$	11,690.
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 \$	11,213.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c \$	477.

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 **BAA** Title **President** Date _____

FIF20502L 11/15/10

Form 8868 (Rev 1-2011)