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

2012

Department of the Treasury
Internal Revenue Service

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

For calendar year 2012, or tax year beginning , 2012, and ending ,

URBANEK-LEVY EDUCATION FUND
51 UNIVERSITY AVENUE G
LOS GATOS, CA 95030

A Employer identification number
94-3372793

B Telephone number (see the instructions)
408-399-8081

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 ☐

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

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)
\$ 290,476.

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) (Part I, column (d) must be on cash basis)

Part III 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 instructions))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

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

REVENUE

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

2 Cl ☒ 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. 133,005.

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) SEE ST 1

b Accounting fees (attach sch) SEE ST 2

c Other prof fees (attach sch)

17 Interest

18 Taxes (attach schedule)(see instrs) SEE STM 3

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule) SEE STATEMENT 4

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

25 Contributions, gifts, grants paid PART XV

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

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

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

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ADMINISTRATIVE 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		6,590.	6,597.	6,597.
	2	Savings and temporary cash investments		73,136.	267,552.	267,552.
	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 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)				
	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			265,907.	16,327.	16,327.
14	Land, buildings, and equipment basis					
	Less: accumulated depreciation (attach schedule)					
15	Other assets (describe)					
16	Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)			345,633.	290,476.	290,476.
LIABILITIES	17	Accounts payable and accrued expenses				
	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)			0.	0.
NET FUND ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, building, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds			345,633.	290,476.
	30	Total net assets or fund balances (see instructions)			345,633.	290,476.
	31	Total liabilities and net assets/fund balances (see instructions)			345,633.	290,476.

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	345,633.
2	Enter amount from Part I, line 27a	2	-55,157.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	290,476.
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	290,476.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a LONG-TERM CAPITAL LOSS FROM GALLEON K-1		P	VARIOUS	VARIOUS
b SHORT-TERM CAPITAL GAIN FROM NEEDHAM K-1		P	VARIOUS	VARIOUS
c LONG-TERM CAPITAL GAIN FROM NEEDHAM K-1		P	VARIOUS	VARIOUS
d LONG-TERM CAPITAL LOSS FROM NEEDHAM TERM		P	VARIOUS	VARIOUS
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a		1,214.	-1,214.
b 12,411.			12,411.
c 120,594.			120,594.
d		5,828.	-5,828.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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			-1,214.
b			12,411.
c			120,594.
d			-5,828.
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	125,963.
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 instructions). If (loss), enter -0- in Part I, line 8	[]	3	12,411.

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))
2011	199,955.	434,193.	0.460521
2010	205,536.	822,373.	0.249930
2009	201,775.	687,166.	0.293634
2008	223,121.	703,600.	0.317113
2007	207,560.	1,384,107.	0.149960

2 Total of line 1, column (d).	2	1.471158
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	0.294232
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	138,931.
5 Multiply line 4 by line 3	5	40,878.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,212.
7 Add lines 5 and 6	7	42,090.
8 Enter qualifying distributions from Part XII, line 4	8	174,536.

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

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

1 a 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 instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here. ☒ and enter 1% of Part I, line 27b		1	1,212.
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	1,212.
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	1,212.
6 Credits/Payments:			
a 2012 estimated tax pmts and 2011 overpayment credited to 2012	6 a	1,000.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c	1,780.	
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	2,780.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	1.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,567.	
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax <u>1,240.</u> Refunded	11	327.	

Part VII Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <u>\$ 0.</u> (2) On foundation managers <u>\$ 0.</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <u>\$ 0.</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XIV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>CA</u>		
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 2012 or the taxable year beginning in 2012 (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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Form 990-PF (2012)

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 make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <u>N/A</u>				
14	The books are in care of <u>KENNETH LEVY</u> Telephone no <u>408-399-8081</u>			
Located at <u>51 UNIVERSITY AVENUE, SUITE G LOS GATOS CA</u> ZIP + 4 <u>95030</u>				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u>			
and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>				
16	At any time during calendar year 2012, 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>				

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?	☐ 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here.	☐	☒ N/A
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 2012?		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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?	☐ Yes	☒ 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 instructions)		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?	☐ Yes	☒ No
b If 'Yes,' did it have excess business holdings in 2012 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 2012.)		N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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 2012?		X

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Form 990-PF (2012)

Part VII Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5 a** 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)

6 a 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

7 a 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
MR. KENNETH LEVY 19800 GLEN UNA DRIVE SARATOGA, CA 95070	TREASURER 0	0.	0.	0.
LIDA URBANEK 75 TUSCALOOSA AVE. ATHERTON, CA 94027	CHAIRMAN 0	0.	0.	0.
GLORIA LEVY 19800 GLEN UNA DRIVE SARATOGA, CA 95070	CEO 0	0.	0.	0.
KARL-HEINZ LACHNIT 25 METRO DRIVE, SUITE 600 SAN JOSE, CA 95110	SECRETARY 0	0.	0.	0.

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

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

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

0

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

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

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

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Form 990-PF (2012)

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
b Average of monthly cash balances	1b 124,720.
c Fair market value of all other assets (see instructions)	1c 16,327.
d Total (add lines 1a, b, and c)	1d 141,047.
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	3 141,047.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4 2,116.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 138,931.
6 Minimum investment return. Enter 5% of line 5	6 6,947.

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 6,947.
2a Tax on investment income for 2012 from Part VI, line 5	2a 1,212.
b Income tax for 2012 (This does not include the tax from Part VI.)	2b
c Add lines 2a and 2b	2c 1,212.
3 Distributable amount before adjustments Subtract line 2c from line 1	3 5,735.
4 Recoveries of amounts treated as qualifying distributions	4
5 Add lines 3 and 4	5 5,735.
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 5,735.

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 174,536.
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	4 174,536.
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 1,212.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6 173,324.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

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Form 990-PF (2012)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				5,735.
2 Undistributed income, if any, as of the end of 2012.				
a Enter amount for 2011 only			0.	
b Total for prior years: 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007	142,955.			
b From 2008	187,941.			
c From 2009	167,455.			
d From 2010	164,587.			
e From 2011	180,131.			
f Total of lines 3a through e	843,069.			
4 Qualifying distributions for 2012 from Part XII, line 4. $\blacktriangleright$ \$ 174,536.				
a Applied to 2011, 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 2012 distributable amount				5,735.
e Remaining amount distributed out of corpus	168,801.			
5 Excess distributions carryover applied to 2012 (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	1,011,870.			
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 2011. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				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 2007 not applied on line 5 or line 7 (see instructions)	142,955.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	868,915.			
10 Analysis of line 9:				
a Excess from 2008	187,941.			
b Excess from 2009	167,455.			
c Excess from 2010	164,587.			
d Excess from 2011	180,131.			
e Excess from 2012	168,801.			

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 2012, 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) 2012	(b) 2011	(c) 2010	(d) 2009	
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 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))

SEE STATEMENT 6

- 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 or e-mail 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:

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED 	NONE	N/A	EDUCATION	171,000.
Total			3 a	171,000.
b Approved for future payment				
Total			3 b	

URBANEK-LEVY EDUCATION FUND

94-3372793

STATEMENT 1
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	\$ 1,430.			\$ 1,430.
TOTAL	\$ 1,430.	\$ 0.		\$ 1,430.

STATEMENT 2
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	\$ 3,188.	\$ 1,594.		\$ 1,594.
TOTAL	\$ 3,188.	\$ 1,594.		\$ 1,594.

STATEMENT 3
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAX	\$ 1,836.			
FOREIGN TAX	102.	\$ 102.		
TOTAL	\$ 1,938.	\$ 102.		\$ 0.

STATEMENT 4
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	\$ 350.			\$ 350.
FEES	80.			80.
OFFICE SUPPLIES	82.			82.
OTHER LOSS FROM GALLEON K-1	370.	\$ 370.		
PORTFOLIO DEDUCTIONS FROM K-1	4,578.	4,578.		
TOTAL	\$ 5,460.	\$ 4,948.		\$ 512.

URBANEK-LEVY EDUCATION FUND

94-3372793

**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 INVESTMENTS</u>			
NEEDHAM CONTRARIAN FUND	COST	\$ 0.	\$ 0.
GALLEON TECH PARTNERS - SPC	COST	16,327.	16,327.
	TOTAL	<u>\$ 16,327.</u>	<u>\$ 16,327.</u>

**STATEMENT 6
FORM 990-PF, PART XV, LINE 1A
FOUNDATION MANAGERS - 2% OR MORE CONTRIBUTORS**

MR. KENNETH LEVY
LIDA URBANEK
GLORIA LEVY

**OPERATING & ADMINISTRATIVE EXP. (990-PF)
INTEREST**

INVESTMENT INTEREST EXPENSE FROM K-1

TOTAL	\$	144.
	\$	<u>144.</u>

Winners of the 2009-2010 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr. year)	PAID FALL 2009	PAID SPRING 2010	PAID FALL 2010	PAID SPR 2011
1	BUGLEWICZ, Samantha SSN [REDACTED]	3974 El Coral Way San Jose, CA 95118	(408) 978-5129	William Buglewicz Dir Ops/Materials	Bran Long	Creighton University 2500 California Plaza Omaha, NE 68178 Ph. 800-282-5835 Fax (402) 280-2895	3000				
		43503 Ocaso Corte Fremont, CA 94539	(510) 651-1336	Kai Cao Sr Electrical Engr Mgr	Henrik Nielsen	Harvard University Harvard College Financial Aid Office 86 Brattle Street Cambridge, MA 02138 Ph (617) 495-1581 Fax (617) 496-0256	1000				
		2522 Wood Hollow Dr Livermore, CA 94550	(925) 443-0963	Ward Dixon Mechanical Engineer	Raul Tan	UC San Diego UCSD Student Business Svc 9500 Gilman Dr Dept 0026 La Jolla, CA 92093 Laura Rivera Ph. (858) 534-4480 Fax. (858) 534-5459	3000				
4	ESAN, Florence SSN [REDACTED] Student ID [REDACTED]	4450 Eiffel Drive Stockton, CA 95206	(209) 234-4847	Kehinde Esan Test Engineer	Jorge Pont	San Joaquin Delta College	2000				
5	FLORES, Vanessa SSN [REDACTED] Student ID [REDACTED]	1689 Adrian Way San Jose, CA 95122	(408) 838-3697	Lenny Dizon Div Sales Ops DROPPED - NO FURTHER CHECKS	Ana Schuman	San Francisco State University 1600 Holloway Ave San Francisco, CA 94132 Attn: Bursars Office, bldg Admin 155 Rose Carmona Ph (415) 338-2588 Fax (415) 338-0949	2000				
6	GENDLER, Michael SSN [REDACTED] Student ID [REDACTED]	1131 Compass Land, #112 Foster City, CA 94404	(650) 522-8008	Roman Gendler SW Engineer	Mir Mustafa Ali	UCLA UCLA Undergraduate Admissions 1147 Murphy Hall PO Box 951436 Los Angeles, CA 90095-1436 Ph (310) 825-3101 Fax (310) 206-1206	3000				

Winners of the 2009-2010 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr year)	PAID FALL 2009	PAID SPRING 2010	PAID FALL 2010	PAID SPR 2011
7	JONG, Enc SSN [REDACTED] Student ID [REDACTED]	817 San Lucas Court Mt View, CA 94043	(650) 967-8945	Betty Jong Admin Assistant	Oreste Donzella	UCLA Le Conte Ave & Westwood Blvd Westwood, CA 90024 Ph (310)825-1091, Opt. 6	3000				
8	JUSUFAGIC, Alma SSN [REDACTED] Student ID [REDACTED]	240 Michelle Drive Campbell, CA 95008	(408) 379-5026	Mirsad Jusufagic WIN Mfg Mgr	Pat Wilkinson	UCLA 1125 Murphy Hall 405 Hilgard Ave Los Angeles, CA 90095 Vu Tran (Admissions) Ph (310) 825-3101 Fax (310) 206-1206	1000				
9	KADKLY, Yunus SSN [REDACTED]	1553 Vista Club Circle, Apt 301 Santa Clara, CA 95054	(408) 987-9913	Azmi Kadkly Prncpal Research Scientist	Guoheng Zhao	Univ of Santa Cruz 1156 High Street Santa Cruz, CA 95064 Ph (831) 459-2131	3000				
		4301 Norwalk Dr , #U-102 San Jose, CA 95129	(408) 725-8240	Haksoo(Rocky) Kim System Engineer	Paul Wieczovek	UCLA 1147 Murphy Hall, Box 951436 Los Angeles, CA 90095-1436 Ph (310) 825-3101 Fax (310)206-1206	3000				
		1209 Fenway Park Pflugerville, TX 78660	(512) 990-2446	Dale Legband Business Unit Manager	Edward Chamer	Southern Methodist University Division of Enrollment Svs PO Box 750181 Jeanene Renfro Ph (214) 768-2058 Fax (214) 768-3056	3000				
		206 Camille Court Pflugerville, TX 78660	(512) 252-8393	Curts Linder (RIF) Email address cclinder@swbell net	Saroja Ramamurthi	Austin Community College 11928 Stonehollow Dr Austin, TX 78758 Mano Tenono Ph (512) 223-4782 Fax (512) 223-4227	3000				

Winners of the 2009-2010 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr year)	PAID FALL 2009	PAID SPRING 2010	PAID FALL 2010	PAID SPR 2011
13	MELE, Chiara SSN	Via Figino 11 B Pero Milano Italy 20100	+39023539248	Franco Mele Service Manager KT Italy ANNUAL TUITION MAILED EACH FALL	Stephane Sztur	Politecnico di Milano Architettura Via Ampere 2 - Milano Italy 20123	2000				
		51 Roundtable Dr , Apt#8 San Jose, CA 95111	(408) 629-1787	Thao Truong Manufacturing	Daniel Soto	Emery University 201 Downman Drive Atlanta, GA 30322 Ph (404) 727-6069 Fax (404) 727-0638	3000				
		3886 Hurstglen Way San Jose, CA 95121	(408) 981-5072	Shene Phom Admin Assistant	Kent Goheen	UC, Riverside 900 University Ave Riverside, CA 92521 Ph (951) 827-3878 Fax (951) 827-5619	2000				
		3132 Browntail Way San Ramon, CA 94582	(650) 219-1602	Prabhu Padmanabhan Sr Programmer Analyst	Manoj Koduru	UC, Berkeley 201 Sproul Hall, #1960 Berkeley, CA 94720-1960 Jan Williams Ph (510) 642-6442 Fax (510) 643-5526	3000				
		207 Isabella Street Hayward, CA 94544	(510) 299-7765	Oscar Salomon	Gerry Onhuela	Cal State Univ East Bay 25800 Carlos Bee Blvd Hayward, CA Louise Martinez (510) 885-3818 Phone (510) 885-3000	2000				

Winners of the 2009-2010 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr. year)	PAID FALL 2009	PAID SPRING 2010	PAID FALL 2010	PAID SPR 2011
18.	SOBOL, Doron ID [REDACTED] Student ID N/A	Moreshet DN Misgav Misgav Israel 20186	972-49999269	David Sobol KT Israel ANNUAL TUITION MAILED EACH FALL	Yaron Ish-shalom	University of Haifa Mount Carmel Haifa Israel 31905 Keren Chahanovitz Ph 972-48288446 Fax 972-48249331	2000				
19	WATSON, Caitlin SSN [REDACTED]	2301 South Court Palo Alto, CA 94301	(650) 321-7282	Sterling Watson VP Strategic Development	Zain Saidin	Columbia College 100 Hamilton Hall MC2802 1130 Amsterdam Ave New York, NY 10027 Ugrad_finaid@columbia.edu Ph (212) 854-4400 Fax (212) 854-5353	1000				
		Bldg 6-3-301, Fangshuiyuan, Meijiang St Hexi District Tianjin China 300221	862288381296	Jichen Yu Customer Support Engineer KT China ANNUAL TUITION MAILED EACH FALL	Kevin Liu	Peabody Institute of The John Hopkins University Financial Aid Office, 1 East Mount Vernon Place Baltimore, MD 21202 Rebecca Polgar Ph (410)234-4900 Fax (410)659-8102)	3000				
21											
22											

Winners of the 2010-2011 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr year)	PAID FALL 2010	PAID SPRING 2011	PAID FALL 2011	PAID SPR 2012
1	AZADIAN, Amanda SSN [REDACTED]	97 Western Ave Essex, MA 01929	(978)768-3362	Jeffrey Azadian Business Dev Mgr	Steve Schatz	Wheaton College 501 College Avenue Wheaton, ILL 60187 Becky Wilson Admins Counselor Ph. (630) 752-5005 Fax. (630) 752-5285	2000				
		91 Lilly Way Watsonville, CA 95076	(831)761-3560	Karen Biagini Dir., Corp Quality	Peter Gaudette	UC Davis – UC Regents One Shields Avenue Davis, CA 95616-8507 Ph (530) 752-2971 Fax. (530) 752-3712	2000				
		2934 E Janelle Way Gilbert, AZ 85298	(480) 621-6131	Sinh Bui Sr Field App Engr/WIN	Nick Miller	Arizona State University PO Box 870112 Tempe, AZ 95287-0112 Attn ASU Cashiering Svc Ph (480) 965-6341 Fax. (480) 965-9242	5000				
		3813 Stone Pointe Way Pleasanton, CA 94588	(925)600-8436	Weixiong Chen Engr/EBI-EBR	Don Chen	Harvard Student Receivables Office Attn outside awards 953 Holyoke Center 1350 Massachusetts Ave Cambridge, MA 02138 Ph (617) 495-2739 Fax(617) 496-0256	3000				
		18 Fairhaven Road Nashua, NH 03060	(603)888-2745	Brian Crawford Dir of Sales, GEM	Steve Schatz	George Washington University 2121 I St, NW Washington, DC 20052 Attn Elizabeth Amundson Ph (202) 994-8977 Fax (202) 994-0325	2000				
		355 Lemarc Street Fremont, CA 94539	(510) 490-1831	Yanong Han Service Sys Engr/GSS	Ian O'Leary	UCLA – UC Regents Undergrad Admissions 1147 Murphy Hall, Box 951436 Ph (310) 825-3101 Fax. (310) 206-1206	4000				

Winners of the 2010-2011 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr year)	PAID FALL 2010	PAID SPRING 2011	PAID FALL 2011	PAID SPR 2012
7											
8	NGUYEN, Vinh SSN [REDACTED]	3335 Cuesta Drive San Jose, CA 95148	(408)270-6379	Loan Nguyen Sr Financial Analyst	Manelle Matthews	New York University 25 West Fourth Street New York, NY 10012-1199 Attn Randall Deike Ph (212) 998-4444 Fax (212) 995-4661	3000				
		3222 Glencoe Circle San Ramon, CA 94582	(925) 828-8290	Krshna Rao Sr Director/GSS	Te-Hua Lin	UC Berkeley (UC Regents) 110 Sproul Hall, #5800 Berkeley, CA 94720-5800 Attn Undergrad Adm Officer Ph (510) 642-3175 Fax (510) 642-7333	3000				
		600 Magdalena Ave Los Altos, CA 94024	(650) 947-8929	Mike Sarhad Quality Mgr, SensArray/VLSI	Phil Arnold	UC Berkeley (US Regents) 110 Sproul Hall Berkeley, CA 94720 Attn Walter Robinson Ph (510) 642-6000 Fax (510) 642-6000	3000				
		20306 Clifden Way Cupertino, CA 95014	(408) 777-0113	Zhengquan Tan Sr Dir Apps, FAST	Ahmad Khan	University of Illinois at Urbana- Champaign 901 West Illinois Street Urbana, IL 61801 Attn Timmi Turley Ph. (217) 333-0302 Fax (217) 244-4614	3000				
		802 Cape Kennedy Drve San Jose, CA 95133	(408) 729-7459	Tinh Tran Cable Designer/Rapid	Donald Haislet	UC San Diego – UC Regents 9500 Gilman Dr, #92093 MC-0013 La Jolla, CA 92093 Becky Obayashi –robayashi@ucsd.edu (858) 534-1067	5000				

Winners of the 2010-2011 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr. year)	PAID FALL 2010	PAID SPRING 2011	PAID FALL 2011	PAID SPR 2012
13.	WELLS, Elizabeth SSN [REDACTED] Student ID [REDACTED]	360 Curie Drive San Jose, CA 95119	(408)226-4407	Ken Wells Dir, Learning	Brent Bloom	San Jose State University One Washington Square San Jose, CA 95129 Deanna Gonzales Ph. (408) 283-7500 Fax. (408)924-2050	3000				
14	WONG, Michael SSN [REDACTED]	1585 Portola Drive Milpitas, CA 95035	(408) 942-0644	Vincent Wong ATE/RAPID	Aaron Teixeira	University of Pennsylvania 005 Franklin Bldg 3451 Walnut Street Philadelphia, PA 19104-6270	4000				
		43634 Euclid Drive Fremont, CA 94539	(510) 661-0992	Alfred Wu Enterprise Architect/IT	Steve Ruggiero	UC Berkeley – UC Regents Financial Aid & Scholarship Office 201 Sprout Hall, #1960 Berkeley, CA 94720-1960 Ph (510)642-6442 Fax (510) 643-5526	4000				
		40100 San Carlos Place Fremont, CA 94539	(510) 573-3412	Michael Yang Engineer SFS/ADE	Steve Cui	UC San Diego 9500 Gilman Drive La Jolla, CA 92023 Enc Quinn – Office of Financial Aid Ph (858) 534-4480 Fax. (858) 534-5459	4000				
19											
20											
21											

Winners of the 2011-2012 Urbanek/Levy Scholarship Fund

Fall paid in August

Spring is paid in late December or January

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr year)	PAID FALL 2011	PAID SPRING 2012	PAID FALL 2012	PAID SPRING 2013	PAID FALL 2013	PAID SPRING 2014	PAID FALL 2014	PAID SPRING 2015
11	AGGARWAL, Amlt	3217 Camanillo Ct San Jose, CA 95135	(408)532-8835	Jain Kalpana Software mgr, Win Div	Jen Wang	UC Davis One Shields Ave Davis, CA 95616 Attn: Trina Wiggins Ph (530) 752-2390 Fax (530) 752-6667	2000								
		1802 US Hwy 290 W Johnson City, TX, 78636	(830) 868-2165	John Banfield SR CSE	Greg Ewing	Texas A&M University College Station Texas A&M University College Station P O Box 30016 College Station, TX 77842-3016 Ph (979) 845-3236 Fax (979) 847-9016	3000								
		10161 Queensbridge Ct San Jose, CA, 95120	(408) 927-6639	Chetana Bhaskar Software Eng	Adris Liang	Columbia University 212 Hamilton Hall, Mail Code 2807 1130 Amsterdam Avenue New York, NY 10027 Attn: David Buckwald Ph (212) 854-2522 Fax (212) 854-3393	2000								
		2137 West Chandler Ave Santa Ana, CA 92704	(714) 432-0445	Timothy Collison Remote Customer Support ENG	Robert Herrera	Calpoly San Luis Obispo California Polytechnic State University 1 Grand Ave San Luis Obispo, CA 93407 Ph (805) 756-1111 Fax (805) 756-7423	4000								
		837 Henderson Ave Sunnyvale, CA 94086	(408) 737-9659	Muon Thi Nguyen Customer Acceptance Eng		UC Davis One Shields Ave Davis, CA 95616 Attn: Trina Wiggins Ph (530) 752-2390 Fax (530) 752-6667	5000								

Comment: [PH11]

Winners of the 2011-2012 Urbanek/Levy Scholarship Fund

Fall paid in August

Spring is paid in late December or January

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr year)	PAID FALL 2011	PAID SPRING 2012	PAID FALL 2012	PAID SPRING 2013	PAID FALL 2013	PAID SPRING 2014	PAID FALL 2014	PAID SPRING 2015
6	JEN, Vivian SSN [REDACTED]	Apt 201, No 9, Lan 358, Hongfeng Road Shanghai, China 201206	+862138619718	Francis Jen Technical Dir		University of California, Berkeley 140 University Hall Berkeley, CA 94720-1111 Attn: Linda Larson Ph (510) 642-3190 Fax (510) 643-5162	4000								
		513 Matina Drive Elk Grove, CA 95757	(916) 714-2549	Jeff Lei Optical Eng	Dale Hinz	Princeton University Undergraduate Financial Aid Box 591, 220 West College Princeton, NJ 08542-0591 Ph (609) 258-3330 Fax (609) 258-0336	4000								
		43 Pagoda Tree Ct Sunnyvale, CA 94086	(408) 733-2157	Thai Nguyen Sr Mechanical Eng	Salam Herb	University of San Diego 9500 Gilman Dr La Jolla, CA 92093 Attn: Mark Adams Ph (858) 822-5830 Fax (858) 534-5723	4000								
		46 Dolliver Drive Charlotte, VT 05445	(802) 425-6219	Wayne Rocheleau Electrical Eng	Michael Tobin	Wake Forest University PO Box 7246 (Financial Aid) Winston-Salem, NC 27109 Attn: Katie Hyland Ph (336) 758-5154 Fax (336) 758-4924	2000								
		420 N Kilee Meridian, ID 83646	(208) 855-0914	Sean Self CSE 4 Rapid	Mike Robey	College of Western Idaho 6056 Birch Lane Nampa, ID 83887 Attn: Brent Glandon Ph (208) 562-3000 Fax: 1 888 562-3216	3000								

Winners of the 2011-2012 Urbanek/Levy Scholarship Fund

Fall paid in August

Spring is paid in late December or January

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr. year)	PAID FALL 2011	PAID SPRING 2012	PAID FALL 2012	PAID SPRING 2013	PAID FALL 2013	PAID SPRING 2014	PAID FALL 2014	PAID SPRING 2015
11	TANG, Joseph SSN [REDACTED]	4026 E Kilmer St Tucson, AZ 85711	(520) 623-9065	Shouhong Tang Sr Principle Eng	Andrew Zeng	University of Arizona University of Arizona Tucson, AZ 85721 Attn: Renee Marquez Ph (520) 621-3237 Fax (520) 621-9799	2000								
		1154 Charmwood CT Sunnyvale, CA 94089	(408) 355-3973	Ellen Quach Software Eng	Eric Tsujimoto	California Polytechnic State Univ California Polytechnic State University 1 Grand Ave San Luis Obispo, CA 93407	4000								
		1691 McGregor Way San Jose, CA 95129	(408) 252-7199	Xiafang Zhang Staff App Eng	Sungchul Yoo	UC Berkeley University of California, Berkeley Financial Aid and Scholarship Office 201 Sproul Hall#1960 Berkeley, CA 94720-1960 Ph (510) 642-6442 Fax (510) 643-5526	3000								
		7584 Hollanderry Place Cupertino, CA 95014	(408) 996-1862	Stephan Wang	Robert Herrera	Stanford University 355 Galvez Street Stanford, CA 94305 Ph (650) 723-3058 Fax (650) 725-0540	5000								
		4021 Chamberer Dr San Jose, CA 95135	(408) 238-1618	Shun Yeun Princ Software Eng	Mir Mustafa Ali	UC Berkeley Department of Electrical Engineering+ Computer Science Berkeley, CA 94720-1770 Attn: Kate Riley Ph (510) 642-6000, (510) 642-3214 Fax (510) 643-7846	5000								
		943 Greenwich Ave Sunnyvale, CA 94087	(408) 431-5525	Piotr Zalicki System Design Eng	Matt Manzer	University of Santa Barbara UC Santa Barbara Santa Barbara, CA 93106 Attn: Robert Chagolla Ph (805) 893-2733 Fax (805) 893-8793	4000								

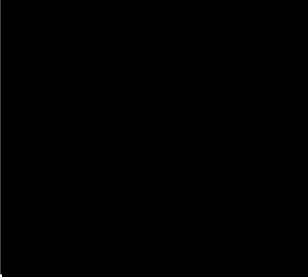
Winners of the 2012-2013 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMT (pr year)	PAID FALL 2012	PAID SPRING 2013	PAID FALL 2013	PAID SPRING 2014	PAID FALL 2014	PAID SPRING 2015	PAID FALL 2015	PAID SPRING 2016
1.	CHEN, Jimmy	5094 NW Skycrest PKWY Portland, OR 97229	(503) 439-0484	Chung-Hsin Chen <i>David Chen</i>		Emory University 201 Downman Drive Atlanta, GA 30332 Emory Admissions Ph. (404.727.6036	4000	✓							
		20221 Bollinger Road Cupertino, CA 95014	(408)253-8480	Raymond Chu Sr Systems Engineer/SFS- WIG		USC University of Southern California Los Angeles, CA 90089 (213) 740-2311	4000	✓							
		16964 Kennedy Road Los Gatos, CA 95032	(408)356-7403	Michael Gasvoda		Colorado School Of Mines 1500 Illinois St Golden, CO 80401 Admissions Ph: 888-446-9489 Fax	1000	✓							
		2310 Lanal Ave San Jose, CA 95122	(408) 923-7257	Mung Ha		Pomona College 333 North College Way Claremont, CA 91711 Ph. (909) 821-8000 Fax	5000	✓							
5.	HILL, Daneil SSN. [REDACTED] Student ID:	4 Captains Way Billerica, MA 01821	(978)667-1199	Charles Hill		Worcester Polytechnic Institute 100 Institute Road Worcester, MA 01609 Ph 508-831-5000 Fax	2000	✓							

Winners of the 2012-2013 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr. year)	PAID- FALL 2012	PAID SPRING 2013	PAID FALL 2013	PAID SPRING 2014	PAID FALL 2014	PAID SPRING 2015	PAID FALL 2015	PAID SPRING 2016
8.	HILL, Joseph	4 Captains Way Billerica, MA 01821	(978)667-1199	Charles Hill		Worcester Polytechnic Institute 100 Institute Road Worcester, MA 01609 Ph 508-831-5000 Fax	2000	✓							
		5317 Pembroke Way San Ramon, CA 94582	(925) 208-1331	Chuan Hu- He <i>Chuck He</i>		Dartmouth College Hanover, NH 03755 USA Phone (603) 646-1110	1,000	✓							
		1670 Jones Lane Los Altos, CA 94024	(650)965-8981	Torsten Koack		Vassar College 124 Raymond Avenue Poughkeepsie, NY 12604 Ph. 845 437-5320 Fax	1000	✓							
		No 37, Lane 95, Jhengsin Road, Sinhua Dist Tainan City, Taiwan 71248	886-6-598-4033	Jane Lin		National Taiwan University No.1, Sec. 4, Roosevelt Road, Taipei, Taiwan Ph + 886 (02) 33663366 Fax	1000	✓							
		600 Magdalena Avenue Los Altos, CA 94024	(650) 947-8929	Samuel Michael Sarhad <i>Michael Sarhad</i>		UC Davis Davis One Shields Avenue Davis, CA 95618 Phone (530) 752-1011	4000	✓							
	Student ID														
11	SRIDHAR, Anusha	Plot 83, Door 7(1 floor), EB Colony 1 st Street, New NGGO Colony, Adambakkam Chennai, Tamil Nadu, India, 600088	+91 44 43559030	Sridhar ManiRao		St. Joseph's College of Engineering Ph. Ph.	1000	✓							

Winners of the 2012-2013 Urbanek/Levy Scholarship Fund

	NAME	ADDRESS	HOME PHONE	KLA-TENCOR PARENT	SUPERVISOR	SCHOOL	AMNT (pr. year)	PAID FALL 2012	PAID SPRING 2013	PAID FALL 2013	PAID SPRING 2014	PAID FALL 2014	PAID SPRING 2015	PAID FALL 2015	PAID SPRING 2016
12.	STEIN, Tomer SSN Student ID	Yechiam 3 Kiryat Shmuel Hifa, ISRAEL 26233	+972048422962	Eyal Etehr <i>Stain</i>		Technion- Israel Institute of Technology Ph Fax	1000	✓							
13.	TOTH, Peter 	1634 Tupolo Drive San Jose, CA 95124	(408) 623-3914	Gabor Tolh		UC Santa Barbara UC Santa Barbara, Santa Barbara CA 93106 Phone	4000	✓							
		4030 Tulip Way San Ramon, CA 94582	(925) 918-3659	Li Weng		UCLA 1147 Murphy Hall, Box 951436 Phone (310) 825-3101	4000	✓							
	Student ID	1098 Norfolk Drive San Jose, CA 95129	(408) 253-1061	Rulin Yang		University of Pennsylvania 1 College Hall, Room 1 Philadelphia, PA 19104-6376 Phone (215) 898-7507 Fax	1000	✓							

190,000
 less: 2012-2013 1/2
 year paid tuition <18,000>
 172,000
 less: timing difference <1,000>
 171,000

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

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service▶ **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***Enter filer's identifying number, see instructions**

Type or print File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	URBANEK-LEVY EDUCATION FUND	94-3372793
	Number, street, and room or suite number. If a P.O. box, see instructions	Social security number (SSN)
	51 UNIVERSITY AVENUE G	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	LOS GATOS, CA 95030	

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 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	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 ▶ KENNETH LEVY

Telephone No. ▶ 408-399-8081 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 8/15, 2013, to file the exempt organization return for the organization named above.
The extension is for the organization's return for:

- ▶ ☒ calendar year 2012 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	\$	2,780.
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	\$	1,000.
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	\$	1,780.

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.