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Form 990-PF

## Return of Private Foundation

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

2012

Open to Public  
Inspection

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 12-01-2012 , and ending 11-30-2013

Name of foundation FRANCIS AND GERTRUDE LEVETT FOUNDATION		A Employer identification number 59-3614021			
Number and street (or P O box number if mail is not delivered to street address) PO BOX 16508		B Telephone number (see instructions) (727) 824-8710			
C If exemption application is pending, check here <input checked="" type="checkbox"/> <input type="checkbox"/>					
D 1. Foreign organizations, check here <input checked="" type="checkbox"/> <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input checked="" type="checkbox"/> <input type="checkbox"/>					
E If private foundation status was terminated under section 507(b)(1)(A), check here <input checked="" type="checkbox"/> <input type="checkbox"/>					
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input checked="" type="checkbox"/> <input type="checkbox"/>					
<b>Part I Analysis of Revenue and Expenses</b> (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 (attach schedule)	125,000			
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	660	660		
	4 Dividends and interest from securities. . . . .	47,204	45,922		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	45,301			
	b Gross sales price for all assets on line 6a 480,391				
	7 Capital gain net income (from Part IV, line 2) . . . . .		45,301		
	8 Net short-term capital gain . . . . .				
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold . . . . .					
c Gross profit or (loss) (attach schedule) . . . . .					
11 Other income (attach schedule) . . . . .					
12 <b>Total.</b> Add lines 1 through 11 . . . . .	218,165	91,883			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	15,215	15,215		0
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	4,000	4,000		0
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	1,846	1,846		0
	19 Depreciation (attach schedule) and depletion . . . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	17	17		0
	<b>24 Total operating and administrative expenses.</b>				
Add lines 13 through 23 . . . . .	21,078	21,078		0	
25 Contributions, gifts, grants paid . . . . .	87,250			87,250	
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	108,328	21,078		87,250	
27 Subtract line 26 from line 12					
a <b>Excess of revenue over expenses and disbursements</b>	109,837				
b <b>Net investment income</b> (if negative, enter -0-) . . . . .		70,805			
c <b>Adjusted net income</b> (if negative, enter -0-) . . . . .					

	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 . . . . .					
	2 Savings and temporary cash investments . . . . .		74,691	123,400	123,400	
	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 page 15 of the instructions) . . . . .					
	7 Other notes and loans receivable (attach schedule) ►					
	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)	101,560	51,432	49,462		
	b Investments—corporate stock (attach schedule) . . . . .	580,287	590,945	828,015		
	c Investments—corporate bonds (attach schedule) . . . . .	434,155	534,753	558,247		
	11 Investments—land, buildings, and equipment basis ►					
Less accumulated depreciation (attach schedule) ►						
12 Investments—mortgage loans . . . . .						
13 Investments—other (attach schedule) . . . . .						
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)	1,190,693	1,300,530	1,559,124			
Liabilities	17 Accounts payable and accrued expenses . . . . .					
	18 Grants payable . . . . .					
	19 Deferred revenue . . . . .					
	20 Loans from officers, directors, trustees, and 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			
	<b>Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.</b>					
	24 Unrestricted . . . . .	1,190,693	1,300,530			
	25 Temporarily restricted . . . . .					
	26 Permanently restricted . . . . .					
	<b>Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/> and complete lines 27 through 31.</b>					
	27 Capital stock, trust principal, or current funds . . . . .					
	28 Paid-in or capital surplus, or land, bldg , and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds					
	30 Total net assets or fund balances (see page 17 of the instructions) . . . . .	1,190,693	1,300,530			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	1,190,693	1,300,530				

**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	1,190,693
2	Enter amount from Part I, line 27a . . . . .		2	109,837
3	Other increases not included in line 2 (itemize) ►		3	0
4	Add lines 1, 2, and 3 . . . . .		4	1,300,530
5	Decreases not included in line 2 (itemize) ►		5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30		6	1,300,530

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
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1a See Additional Data Table

b

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)
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a See Additional Data Table

b

c

d

e

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
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a See Additional Data Table

b

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	45,301
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	

**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 page 18 of 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 (col (b) divided by col (c))
2011	73,047	1,371,759	0 053251
2010	64,897	1,192,480	0 054422
2009	57,624	1,096,279	0 052563
2008	51,787	911,994	0 056784
2007	51,129	947,920	0 053938

2 Total of line 1, column (d).	2	0 270958
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 054192
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	1,424,095
5 Multiply line 4 by line 3.	5	77,175
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	708
7 Add lines 5 and 6.	7	77,883
8 Enter qualifying distributions from Part XII, line 4.	8	87,250

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 page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1	1	708
Date of ruling or determination letter _____ <b>(attach copy of letter if necessary—see instructions)</b>			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .			
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	2	0
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		
3	Add lines 1 and 2. . . . .		
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	3	708
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		
6	Credits/Payments		
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,493
b	Exempt foreign organizations—tax withheld at source . . . . .		
c	Tax paid with application for extension of time to file (Form 8868)		
d	Backup withholding erroneously withheld . . . . .		
7	Total credits and payments Add lines 6a through 6d. . . . .	7	1,493
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .		
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	10	785
11	Enter the amount of line 10 to be <b>Credited to 2013 estimated tax</b> <input type="checkbox"/> 785 <b>Refunded</b> <input type="checkbox"/>		
		11	0

**Part VII-A Statements Regarding Activities**

		<b>Yes</b>	<b>No</b>
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? . . . . .	1a	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of 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>		
c	Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	1c	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year <b>(1)</b> On the foundation <input type="checkbox"/> \$ _____ 0 <b>(2)</b> On foundation managers <input type="checkbox"/> \$ _____ 0		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____ 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>	2	No
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>		
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	4b	No
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>		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none"> <li>● By language in the governing instrument, or</li> <li>● 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? . . . . .</li> </ul>		
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	6	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/>		
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>		
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>	7	Yes
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		
		9	No
		10	No

**Part VII-A Statements Regarding Activities (continued)**

11		No
12		No
13	Yes	

Website address ► N/A

14 The books are in care of ► SABAL TRUST COMPANY Telephone no ► (727) 824-8700  
 Located at ► 200 CENTRAL AVENUE STE 220 SAINT PETERSBURG FL ZIP +4 ► 33701

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ► 15 and enter the amount of tax-exempt interest received or accrued during the year. ►

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

See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ►

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ► Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ► Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ► Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ► Yes <input checked="" 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)? ► 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). ► Yes <input checked="" type="checkbox"/> No		
1b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? ►	1b	
Organizations relying on a current notice regarding disaster assistance check here. ►		
1c 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? ►	1c	No
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 <input checked="" type="checkbox"/> No If "Yes," list the years ► 20____, 20____, 20____, 20____	2a	
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) ►	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ► Yes <input checked="" type="checkbox"/> No	3a	
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.) ►	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ►	4a	No
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? ►	4b	No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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	
	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? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No		
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .			
	<i>If "Yes" to 6b, file Form 8870.</i>			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		7b	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .			

**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 <b>(If not paid, enter -0-)</b>	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
GERTRUDE LEVETT 545 CAPRI BLVD TREASURE ISLAND, FL 33706	CO TRUSTEE 0 00	0	0	0
SABAL TRUST COMPANY 200 CENTRAL AVENUE STE 220 SAINT PETERSBURG, FL 33701	CO TRUSTEE 0 00	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				
<b>Total number of other employees paid over \$50,000.</b> . . . . .				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		

**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	1,356,987
b Average of monthly cash balances. . . . .	1b	88,795
c Fair market value of all other assets (see instructions). . . . .	1c	0
<b>d Total</b> (add lines 1a, b, and c). . . . .	1d	1,445,782
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
<b>2 Acquisition indebtedness applicable to line 1 assets.</b> . . . . .	2	0
<b>3 Subtract line 2 from line 1d.</b> . . . . .	3	1,445,782
<b>4 Cash deemed held for charitable activities</b> Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	21,687
<b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,424,095
<b>6 Minimum investment return.</b> Enter 5% of line 5. . . . .	6	71,205

**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	71,205
2a Tax on investment income for 2012 from Part VI, line 5. . . . .	2a	708
b Income tax for 2012 (This does not include the tax from Part VI ). . . . .	2b	
c Add lines 2a and 2b. . . . .	2c	708
3 Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	70,497
4 Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5 Add lines 3 and 4. . . . .	5	70,497
6 Deduction from distributable amount (see instructions). . . . .	6	0
<b>7 Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	70,497

**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	87,250
b Program-related investments—total from Part IX-B. . . . .	1b	0
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3 Amounts set aside for specific charitable projects that satisfy the		
a Suitability test (prior IRS approval required). . . . .	3a	
b Cash distribution test (attach the required schedule). . . . .	3b	
<b>4 Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	87,250
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	708
<b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	6	86,542

**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 2011	(c) 2011	(d) 2012
<b>1</b> Distributable amount for 2012 from Part XI, line 7				70,497
<b>2</b> Undistributed income, if any, as of the end of 2012			0	
<b>a</b> Enter amount for 2011 only. . . . .				
<b>b</b> Total for prior years 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2012				
<b>a</b> From 2007. . . . .				
<b>b</b> From 2008. . . . .	4,527			
<b>c</b> From 2009. . . . .	3,562			
<b>d</b> From 2010. . . . .	55,729			
<b>e</b> From 2011. . . . .	6,505			
<b>f Total of lines 3a through e. . . . .</b>	70,323			
<b>4</b> Qualifying distributions for 2012 from Part XII, line 4 ► \$ _____ 87,250			0	
<b>a</b> Applied to 2011, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2012 distributable amount. . . . .				70,497
<b>e</b> Remaining amount distributed out of corpus	16,753			
<b>5</b> Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> Enter the net total of each column as indicated below:	87,076			
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .		0		
<b>c</b> 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		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013 . . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . . . .	0			
<b>8</b> Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . . . .	0			
<b>9</b> Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a . . . . .	87,076			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2008. . . . .	4,527			
<b>b</b> Excess from 2009. . . . .	3,562			
<b>c</b> Excess from 2010. . . . .	55,729			
<b>d</b> Excess from 2011. . . . .	6,505			
<b>e</b> Excess from 2012. . . . .	16,753			

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

1a	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. <input type="text"/>			
b	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)			
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.			
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 organization had \$5,000 or more in assets at any time during the year—see instructions.)****1 Information Regarding Foundation Managers:**

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

GERTRUDE LEVETT

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

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

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

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

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

c Any submission deadlines

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

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

Recipient	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
Name and address (home or business)				
<b>a Paid during the year</b> See Additional Data Table				
<b>Total</b>			► 3a	87,250
<b>b Approved for future payment</b>				
<b>Total</b>			► 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
Line	Description	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b>	<b>Program service revenue</b>					
a						
b						
c						
d						
e						
f						
<b>g</b>	<b>Fees and contracts from government agencies</b>					
<b>2</b>	<b>Membership dues and assessments</b>					
<b>3</b>	<b>Interest on savings and temporary cash investments</b>			14	660	
<b>4</b>	<b>Dividends and interest from securities</b>			14	47,204	
<b>5</b>	<b>Net rental income or (loss) from real estate</b>					
a	Debt-financed property					
b	Not debt-financed property					
<b>6</b>	<b>Net rental income or (loss) from personal property</b>					
<b>7</b>	<b>Other investment income</b>					
<b>8</b>	<b>Gain or (loss) from sales of assets other than inventory</b>			18	45,301	
<b>9</b>	<b>Net income or (loss) from special events</b>					
<b>10</b>	<b>Gross profit or (loss) from sales of inventory</b>					
<b>11</b>	<b>Other revenue</b> a					
b						
c						
d						
e						
<b>12</b>	<b>Subtotal Add columns (b), (d), and (e)</b>		0		93,165	
<b>13</b>	<b>Total Add line 12, columns (b), (d), and (e)</b>			13		93,165
	(See worksheet in line 13 instructions to verify calculations.)					

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



**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d**

<b>(a)</b> List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo, day, yr)	<b>(d)</b> Date sold (mo, day, yr)
25 ABBOTT LABORATORIES	P	2012-03-09	2013-01-24
50 ABBOTT LABORATORIES	P	2010-07-02	2013-01-24
100 ABBOTT LABORATORIES	P	2010-02-05	2012-12-13
175 ABBOTT LABORATORIES	P	2008-05-02	2012-12-13
75 ABBVIE INC	P	2008-05-02	2013-08-19
50 AIR PRODUCTS & CHEMICAL	P	2012-12-13	2013-11-27
275 BANK OF MONTREAL COM	P	2011-01-18	2013-09-12
50 BAXTER INT'L INC COM	P	2012-03-09	2012-12-13
25 BLACKROCK INC	P	2011-11-01	2013-08-19
200 CISCO SYSTEMS INC	P	2012-09-20	2013-08-19
25,000 CON EDISON CO OF NY	P	2009-04-27	2013-06-15
250 EXXON MOBIL CORP	P	2010-10-19	2012-12-13
50,000 UN FEDERAL HOME LOAN MORTGAGE	P	2013-02-15	2013-08-15
50,000 UN FEDERAL NATIONAL MORTGAGE ASSN	P	2013-02-15	2013-08-15
100,000 UN FEDERAL NATIONAL MORTGAGE ASSN	P	2013-03-20	2013-08-06
100 GENERAL MILLS	P	2012-06-28	2012-12-13
100 HOME DEPOT	P	2011-06-07	2012-12-13
300 HOME DEPOT	P	2011-01-18	2012-12-13
25 JOHNSON & JOHNSON	P	2008-05-02	2012-12-13
50 JOHNSON & JOHNSON	P	2008-05-02	2013-11-27
150 AIR PRODUCTS & CHEMICAL	P	2009-02-09	2013-11-27
50 BANK OF MONTREAL COM	P	2012-12-13	2013-09-12
150 MATTEL INC	P	2012-03-09	2012-12-13
175 MICROSOFT CORP	P	2009-08-10	2013-11-27
25 MICROSOFT CORP	P	2009-05-07	2013-11-27
1000 MORGAN STANLEY CAPITAL TRUST	P	2007-12-13	2013-08-23
75 NOVARTIS AG SPONSORED ADR	P	2010-07-02	2012-12-13
25000 PPG INDUSTRIES INC NOTE	P	2009-04-08	2013-03-15
50 PAYCHECK IN COMM	P	2009-05-07	2013-11-27
75 RAYONIER INC	P	2008-08-20	2012-12-13

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d**

<b>(a)</b> List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo, day, yr)	<b>(d)</b> Date sold (mo, day, yr)
100 SYSCO	P	2011-06-07	2013-08-19
500 SYSCO	P	2010-02-05	2013-08-19
200 SYSCO	P	2009-05-07	2013-08-19
75 TARGET CORP COM	P	2012-09-20	2012-12-13
25 3M COMPANY COMMON	P	2008-09-05	2013-08-19
25 UNITED PARCEL SERVICE	P	2010-07-02	2013-11-27
25 UNITED TECHNOLOGIES CORP	P	2009-02-09	2013-11-27
25 V F CORP COMMON	P	2012-12-13	2013-11-27
75 VODAFONE GROUP PLC	P	2012-12-13	2013-11-27
75 WASTE MGMT INC DEL COM	P	2012-12-13	2013-03-14
100 WASTE MGMT INC DEL COM	P	2010-03-01	2013-03-14
325 WASTE MGMT INC DEL COM	P	2008-09-05	2013-03-14
CAPITAL GAINS DIVIDENDS	P		

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h**

<b>(e) Gross sales price</b>	<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>	<b>(h) Gain or (loss) (e) plus (f) minus (g)</b>
819		693	126
1,637		1,117	520
3,274		2,588	686
5,729		4,502	1,227
3,263		2,092	1,171
5,445		4,153	1,292
17,682		16,534	1,148
3,287		2,953	334
6,731		3,837	2,894
4,910		3,815	1,095
25,000		25,115	-115
22,200		16,215	5,985
50,000		50,130	-130
43,745		49,925	-6,180
91,793		100,007	-8,214
4,153		3,759	394
6,251		3,468	2,783
18,752		10,825	7,927
1,772		1,707	65
4,738		3,414	1,324
16,334		8,383	7,951
3,215		3,052	163
5,543		4,961	582
6,575		4,097	2,478
939		483	456
24,646		21,250	3,396
4,735		3,581	1,154
25,000		25,387	-387
2,182		1,349	833
3,742		2,147	1,595

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h**

<b>(e) Gross sales price</b>	<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>	<b>(h) Gain or (loss) (e) plus (f) minus (g)</b>
3,261		3,105	156
16,304		13,577	2,727
6,522		4,710	1,812
4,599		4,899	-300
2,882		1,733	1,149
2,555		1,415	1,140
2,788		1,240	1,548
5,869		3,696	2,173
2,783		1,960	823
2,783		2,519	264
3,711		3,338	373
12,061		11,359	702
181			181

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l**

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

**(l) Gains (Col (h) gain minus  
col (k), but not less than -0-) or  
Losses (from col (h))**

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
			126
			520
			686
			1,227
			1,171
			1,292
			1,148
			334
			2,894
			1,095
			-115
			5,985
			-130
			-6,180
			-8,214
			394
			2,783
			7,927
			65
			1,324
			7,951
			163
			582
			2,478
			456
			3,396
			1,154
			-387
			833
			1,595

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - I**

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))</b>
<b>(i) F M V as of 12/31/69</b>	<b>(j) Adjusted basis as of 12/31/69</b>	<b>(k) Excess of col (i) over col (j), if any</b>	
			156
			2,727
			1,812
			-300
			1,149
			1,140
			1,548
			2,173
			823
			264
			373
			702
			181

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
<b>a Paid during the year</b>				
ACADEMY PREP FOUNDATION INC 2301 22ND AVENUE SOUTH ST PETERSBURG, FL 33712			FOR EDUCATION	1,000
ALS ASSOCIATION 3242 PARKSIDE CENTER CIRCLE TAMPA, FL 336190907			FOR MEDICAL ADVANCEMENT	1,750
ALZHEIMER'S ASSN OF TAMPA BAY 14010 ROOSEVELT BOULEVARD SUITE 709 CLEARWATER, FL 33762			FOR MEDICAL ADVANCEMENT	1,750
AMERICAN MACULAR DEGENERATION FDN PO BOX 515 NORTHAMPTON, MA 010610515			FOR MEDICAL ADVANCEMENT	1,500
AMERICAN RED CROSS - PINELLAS CHAP 818 4TH STREET NORTH ST PETERSBURG, FL 337012324			FOR FAMILY ASSISTANCE	3,000
CASA PO BOX 414 ST PETERSBURG, FL 33731			FOR FAMILY ASSISTANCE	3,500
CHILDREN'S DREAM FUND PO BOX 1881 ST PETERSBURG, FL 33731			FOR CHILDREN CARE	1,500
CHILDREN'S HOME SOCIETY OF FLORIDA 1515 MICHELIN COURT LUTZ, FL 33549			FOR CHILDREN CARE	1,500
CYSTIC FIBROSIS FOUNDATION 6931 ARLINGTON ROAD BETHESDA, MD 20814			FOR MEDICAL ADVANCEMENT	1,000
DOCTORS WITHOUT BORDERS USA PO BOX 5030 HAGERSTOWN, MD 217415030			FOR MEDICAL ADVANCEMENT	2,000
EPILEPSY SERVICES FOUNDATION INC 4628 NORTH ARMENIA AVENUE TAMPA, FL 33603			FOR MEDICAL ADVANCEMENT	1,500
FISHER HOUSE FOUNDATION INC 111 ROCKVILLE PIKE SUITE 420 ROCKVILLE, MD 208505168			FOR MILITARY FAMILY ASSISTANCE	1,500
FLORIDA SHERIFFS YOUTH RANCHES INC PO BOX 2000 BOYS RANCH, FL 32064			FOR CHILDREN CARE	1,500
GLAUCOMA FOUNDATION 80 MAIDEN LANE SUITE 700 NEW YORK, NY 102730672			FOR MEDICAL ADVANCEMENT	1,500
GUIDING EYES FOR THE BLIND INC 611 GRANITE SPRINGS ROAD YORKTOWN HEIGHTS, NY 105989986			FOR MEDICAL ADVANCEMENT	1,500

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
<b>a Paid during the year</b>				
MOFFITT CANCER CENTER & RESEARCH FOUNDATION 12902 MAGNOLIA DRIVE TAMPA, FL 336129416			FOR MEDICAL ADVANCEMENT	1,500
HERITAGE FOUNDATION 214 MASSACHUSETTS AVENUE NE WASHINGTON, DC 20002			FOR PUBLIC POLICY RESEARCH	3,000
THE HOPE INSTITUTE FOR CHILDREN AND FAMILIES 15 E HAZEL DELL LANE PO BOX 2759 SPRINGFIELD, IL 627124210			FOR FAMILY ASSISTANCE	1,000
LEUKEMIA & LYMPHOMA SOCIETY 3507 EAST FRONTAGE ROAD SUITE 300 TAMPA, FL 33607			FOR MEDICAL ADVANCEMENT	1,500
MOREAN ARTS CENTER 719 CENTRAL AVENUE ST PETERSBURG, FL 33701			FOR EDUCATION & SUPPORT OF THE ARTS	1,000
MUSCULAR DYSTROPHY ASSOCIATION 3300 EAST SUNRISE DRIVE TUCSON, AZ 857183299			FOR MEDICAL ADVANCEMENT	1,500
NATIONAL PARKINSON FOUNDATION INC 1501 NW 9TH AVENUE MIAMI, FL 33136			FOR MEDICAL ADVANCEMENT	2,500
NEIGHBORLY CARE NETWORK INC 13945 EVERGREEN AVENUE CLEARWATER, FL 33762			FOR FAMILY ASSISTANCE	2,000
PACE 5540 PARK BOULEVARD PINELLAS PARK, FL 33781			FOR EDUCATION	3,000
PILGRIM CHILD DEVELOPMENT CENTER 6315 CENTRAL AVENUE ST PETERSBURG, FL 337108432			FOR CHILDREN CARE	3,000
RONALD MCDONALD HOUSE 28 COLUMBIA DRIVE TAMPA, FL 336063543			FOR FAMILY ASSISTANCE	1,500
SALVATION ARMY PO BOX 270848 TAMPA, FL 336880848			FOR FAMILY ASSISTANCE	1,500
SEEDLINGS BRAILLE BOOKS FOR CHILDREN PO BOX 51924 LIVONIA, MI 481515924			FOR MEDICAL ADVANCEMENT	2,000
SHRINERS HOSPITAL FOR CHILDREN 2900 ROCKY POINT DRIVE TAMPA, FL 33607			FOR MEDICAL ADVANCEMENT	1,000
ST JUDE CHILDREN'S RESEARCH HOSPITAL 501 ST JUDE PLACE MEMPHIS, TN 381051942			FOR MEDICAL ADVANCEMENT	1,250

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
<b>a Paid during the year</b>				
ST PETERSBURG FREE CLINIC 863 3RD AVENUE NORTH ST PETERSBURG, FL 33701			FOR MEDICAL ADVANCEMENT	3,000
SOCIETY OF ST VINCENT DEPAUL 384 15TH STREET NORTH ST PETERSBURG, FL 337052016			FOR FAMILY ASSISTANCE	1,250
SUNCOAST HOSPICE FOUNDATION 5771 ROOSEVELT BOULEVARD CLEARWATER, FL 33760			FOR FAMILY ASSISTANCE	2,500
US OLYMPIC COMMITTEE 1 OLYMPIC PLAZA COLORADO SPRINGS, CO 80909			FOR EDUCATION & SPORTS ADVANCEMENT	2,000
US FUND FOR UNICEF 125 MAIDEN LANE NEW YORK, NY 10038			FOR MEDICAL ADVANCEMENT	1,000
USO PO BOX 96860 WASHINGTON, DC 200777677			FOR SUPPORT & WELFARE OF MILITARY	1,250
WEDU PUBLIC BROADCASTING 1300 NORTH BOULEVARD TAMPA, FL 336075645			FOR PUBLIC AWARENESS	2,000
ZOLA LEVITT MINISTRIES INC PO BOX 12268 DALLAS, TX 75225			FOR EDUCATION & RELIGION ADVANCEMENT	2,000
JEWISH FEDERATION OF PINELLAS COUNTY 13191 STARKEY ROAD LARGO, FL 33773			FOR EDUCATION & RELIGION ADVANCEMENT	1,500
MEOR AT YALE 900 CHAPEL STREET SUITE 224 NEW HAVEN, CT 06510			FOR EDUCATION ADVANCEMENT	1,000
AMERICAN FRIENDS OF MAGEN DAVID ADOM 352 7TH AVENUE SUITE 400 NEW YORK, NY 10001			FOR MEDICAL ADVANCEMENT	1,000
CHEVRA HATZALAH OF THE ROCKAWAYS & NASSAU COUNTY 621 BEACH 9TH STREET FAR ROCKAWAY, NY 11691			FOR MEDICAL ADVANCEMENT	1,000
THE OPTIMATES SOCIETY YALE STATION BOX 5778 NEW HAVEN, CT 06520			FOR EDUCATION ADVANCEMENT	1,000
METROPOLITAN MINISTRIES 2002 NORTH FLORIDA AVENUE TAMPA, FL 336022204			FOR ASSISTANCE TO INDIGENT FAMILIES	2,000
MULTIPLE SCLEROSIS PO BOX 621207 ORLANDO, FL 328621207			FOR MEDICAL ADVANCEMENT	1,500

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
<b>a Paid during the year</b>				
THE NATIONAL CHILDREN'S CANCER SOCIETY ONE SOUTH MEMORIAL DRIVE SUITE 800 ST LOUISE, MO 63102			FOR MEDICAL ADVANCEMENT	1,500
SPECIAL OLYMPICS FLORIDA 2235 NE COACHMAN ROAD CLEARWATER, FL 33765			FOR DISABILITY ASSISTANCE	1,500
EASTER SEALS 2403 HENRY AVENUE TAMPA, FL 33610			FOR DISABILITY ASSISTANCE	2,000
SMITHSONIAN INSTITUTION PO BOX 37012 MRC 035 WASHINGTON, DC 200137012			FOR EDUCATION & SUPPORT OF THE ARTS	1,000
FRIENDS OF THE ISLAND PARKS INC 1 CAUSEWAY BOULEVARD DUNEDIN, FL 34698			FOR SUPPORT & PROTECTION OF ISLAND PARKS	4,000
<b>Total</b>			► 3a	87,250

2012

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

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

**Name of the organization**  
FRANCIS AND GERTRUDE LEVETT FOUNDATION**Employer identification number**

59-3614021

**Organization type** (check one)**Filers of:****Section:**

Form 990 or 990-EZ

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

Form 990-PF

501(c)(3) exempt private foundation  
 4947(a)(1) nonexempt charitable trust treated as a private foundation  
 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions**General Rule**

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

**Special Rules**

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33<sup>1/3</sup>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year . . . . . ► \$ \_\_\_\_\_

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

**Name of organization**

FRANCIS AND GERTRUDE LEVETT FOUNDATION

**Employer identification number**

59-3614021

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	GERTRUDE LEVETT 545 CAPRI BLVD  TREASURE ISLAND, FL 33706	\$ 125,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )

Name of organization FRANCIS AND GERTRUDE LEVETT FOUNDATION			Employer identification number 59-3614021
Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received

Name of organization FRANCIS AND GERTRUDE LEVETT FOUNDATION			Employer identification number 59-3614021
<b>Part III</b> <b>Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year.</b> Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of <i>exclusively religious, charitable, etc., contributions of \$1,000 or less</i> for the year (Enter this information once. See instructions ) ► \$ Use duplicate copies of Part III if additional space is needed			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—

## TY 2012 Accounting Fees Schedule

**Name:** FRANCIS AND GERTRUDE LEVETT FOUNDATION

**EIN:** 59-3614021

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
	4,000	4,000		0

## TY 2012 Investments Corporate Bonds Schedule

**Name:** FRANCIS AND GERTRUDE LEVETT FOUNDATION  
**EIN:** 59-3614021

Name of Bond	End of Year Book Value	End of Year Fair Market Value
	534,753	558,247

## TY 2012 Investments Corporate Stock Schedule

**Name:** FRANCIS AND GERTRUDE LEVETT FOUNDATION

**EIN:** 59-3614021

Name of Stock	End of Year Book Value	End of Year Fair Market Value
	590,945	828,015

## TY 2012 Investments Government Obligations Schedule

**Name:** FRANCIS AND GERTRUDE LEVETT FOUNDATION  
**EIN:** 59-3614021

<b>US Government Securities - End of Year</b>	<b>Book Value:</b>	51,432
<b>US Government Securities - End of Year</b>	<b>Fair Market Value:</b>	49,462
<b>State &amp; Local Government Securities - End of Year</b>	<b>Book Value:</b>	0
<b>State &amp; Local Government Securities - End of Year</b>	<b>Fair Market Value:</b>	0

## TY 2012 Other Expenses Schedule

**Name:** FRANCIS AND GERTRUDE LEVETT FOUNDATION

**EIN:** 59-3614021

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATIVE FEES	17	17		0

## TY 2012 Taxes Schedule

**Name:** FRANCIS AND GERTRUDE LEVETT FOUNDATION**EIN:** 59-3614021

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX PAID	240	240		0
990	1,606	1,606		0