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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.

▶ Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation
HYMAN JEBB LEVY FOUNDATION

A Employer identification number
23-7422872

Number and street (or P O box number if mail is not delivered to street address)
6634 VALJEAN AVE

Room/suite

B Telephone number (see instructions)
(818) 781-4552

City or town, state or province, country, and ZIP or foreign postal code
VAN NUYS, CA 91406

C If exemption application is pending, check here ▶ ☐

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

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 ▶ ☐

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, col. (c), line 16)*▶$ 5,123,179

J Accounting method ☐ Cash ☑ Accrual ☐ Other (specify) ________ *(Part I, column (d) must be on cash basis.)*

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	17,951	17,951	17,951	
	4	Dividends and interest from securities	138,026	138,026	138,026	
	5a	Gross rents				
	b	Net rental income or (loss) ________				
	6a	Net gain or (loss) from sale of assets not on line 10	40,748			
	b	Gross sales price for all assets on line 6a 1,176,359				
	7	Capital gain net income (from Part IV, line 2)		40,748		
	8	Net short-term capital gain			31,048	
	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	**Total.** Add lines 1 through 11	196,850	196,725	187,025	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	5,690	5,690		
	c	Other professional fees (attach schedule)	13,787	13,787		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	4,399	1,006		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	23,876	20,483		0
	25	Contributions, gifts, grants paid	421,600			421,600
	26	**Total expenses and disbursements.** Add lines 24 and 25	445,476	20,483		421,600
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-248,626			
	b	**Net investment income** (if negative, enter -0-)		176,242		
	c	**Adjusted net income** (if negative, enter -0-)			187,025	

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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	1,545,987	601,193	601,193
	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 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)		100,000	127,587
	b	Investments—corporate stock (attach schedule)	1,757,229	2,379,248	3,109,480
	c	Investments—corporate bonds (attach schedule)	1,185,823	1,159,970	1,121,819
	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 ▶)	163,101	163,103	163,100
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	4,652,140	4,403,514	5,123,179
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	75,000	75,000	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	75,000	75,000	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	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	4,577,140	4,328,514	
	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)	4,577,140	4,328,514	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	4,652,140	4,403,514	

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	4,577,140
2	Enter amount from Part I, line 27a	2	-248,626
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,328,514
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	4,328,514

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	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)
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			(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	
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	40,748
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	31,048

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))
2012	225,675	4,852,327	0 04651
2011	419,674	4,921,738	0 08527
2010	326,468	4,756,570	0 06864
2009	219,286	3,597,353	0 06096
2008	141,125	4,097,985	0 03444

2	**Total** of line 1, column (d).	2	0 29581
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 05916
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	4,881,403
5	Multiply line 4 by line 3.	5	288,794
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,762
7	Add lines 5 and 6.	7	290,556
8	Enter qualifying distributions from Part XII, line 4.	8	421,600

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 ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b	1	1,762
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	1,762
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	1,762
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a: 2,468		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	2,468
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	706
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 706 **Refunded** ▶	11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	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)?	1b		No
	*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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	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? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶HYMAN JEBB LEVY Telephone no ▶(818) 781-4552

Located at ▶6634 VALJEAN AVE VAN NUYS CA ZIP+4 ▶91406

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 2013, 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		No
	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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
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		No
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 ☑ No			
b	If "Yes," did it have excess business holdings in 2013 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 2013.)*	3b		No
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 2013?	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))? ☐ **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**		**No**
	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? ☐ **Yes** ☑ **No**			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ **Yes** ☑ **No**			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		**No**
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ **Yes** ☑ **No**			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		**No**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (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
HYMAN LEVY 6634 VALJEAN AVE VAN NUYS, CA 91406	President 5 00	0		
DONNA LEVY 6634 VALJEAN AVE VAN NUYS, CA 91406	Secretary 1 00	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 ▶

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. . . . . ▶		

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	
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	
2	
All other program-related investments See page 24 of the instructions **3**	
Total. Add lines 1 through 3 . . . . ▶	

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	4,037,823
b	Average of monthly cash balances	1b	754,816
c	Fair market value of all other assets (see instructions)	1c	163,100
d	**Total** (add lines 1a, b, and c)	1d	4,955,739
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	
3	Subtract line 2 from line 1d	3	4,955,739
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	74,336
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,881,403
6	**Minimum investment return.** Enter 5% of line 5	6	244,070

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	244,070
2a	Tax on investment income for 2013 from Part VI, line 5 2a 1,762		
b	Income tax for 2013 (This does not include the tax from Part VI) 2b		
c	Add lines 2a and 2b	2c	1,762
3	Distributable amount before adjustments Subtract line 2c from line 1	3	242,308
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	242,308
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	242,308

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	421,600
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	421,600
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	1,762
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	419,838

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				242,308
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009. 26,033				
c From 2010. 94,373				
d From 2011. 176,299				
e From 2012.				
f **Total** of lines 3a through e.	296,705			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 421,600				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				242,308
e Remaining amount distributed out of corpus	179,292			
5 Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	475,997			
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount —see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				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)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a	475,997			
10 Analysis of line 9				
a Excess from 2009. . . . 26,033				
b Excess from 2010. . . . 94,373				
c Excess from 2011. . . . 176,299				
d Excess from 2012. . . .				
e Excess from 2013. . . . 179,292				

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 2013, enter the date of the ruling . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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))

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 or e-mail address of the person to whom applications should be addressed

Hyman Levy
6634 Valjean Ave
Van NUys, CA 91406
(818) 781-4552

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

No specific form background information & brochure on applicant

c Any submission deadlines

none

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

none

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 Additional Data Table				
Total . . . . ▶ **3a**				421,600
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	17,951	
4 Dividends and interest from securities. . . .			14	138,026	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18		40,748
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				155,977	40,748

13 Total. Add line 12, columns (b), (d), and (e). **13** 196,725

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

******	2014-05-29	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
L LARRY CLUMECK				P01371460

Firm's name	Clumeck Stern Schenkelberg & Getzoff	Firm's EIN
Firm's address	17404 Ventura Bl 2nd Floor Encino, CA 91316	Phone no (818) 906-2230

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

(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)
4500 45 DOUBLE LINE TOTAL RETURN	P	2012-01-24	2013-01-10
185,997 DOUBLE LINE TOTAL RETURN	P	2012-02-05	2013-01-10
1000 EATON VANCE FLOATING	P	2007-07-31	2013-01-09
1000 EATON VANCE FLOATING	P	2007-08-01	2013-01-09
1000 NEXTER ENERGY CAP HLDGS	P	2007-08-01	2013-01-09
100 PROLOGIS INC	P	2007-08-01	2013-04-19
1000 MORGAN CHASE	P	2004-04-20	2013-05-08
100000 JP MORGAN CHASE & CO	P	2011-12-14	2013-09-30
180 AMAZON COM INC	P	2013-01-14	2013-03-19
1544 ISAHRE FTSE CHINA 25	P	2013-01-02	2013-02-26
626 ALLERGAN INC	P	2013-01-25	2013-05-17
1747 SPDR S&P HOMEBUILDERS	P	2013-01-17	2013-07-02
1200 EBAY INC	P	2013-01-02	2013-07-18
199 PANERA BREAD CO	P	2012-09-14	2013-07-24
1019 STRABUCKS CORP	P	2013-03-12	2013-07-24
657 GARTNER INC	P	2013-01-24	2013-08-07
781 SPDR DOW JONES IND	P	2012-01-04	2013-08-27
185 SPDR DOW JONES IND	P	2012-01-19	2013-08-27
717 ISHARES TR RUSSELL 1000	P	2013-05-13	2013-08-28
500 WELLS FARGO CAP 5 85%	P	2010-06-03	2013-02-04
500 WELLS FARGO CAP 5 625%	P	2010-06-03	2013-02-04
500 WELLS FARGO CAP 5 625%	P	2010-06-03	2013-02-04
500 FIRST TRUST SENIOR FLOATING RATE	P	2011-02-24	2013-04-06
500 LMP CORP LOAN FUND INC	P	2011-02-24	2013-04-17
100 COHEN & STEERS QUALITY INCOME FUND	P	2010-12-10	2013-05-29
200 COHEN & STEERS QUALITY INCOME FUND	P	2010-12-10	2013-05-29
694 COHEN & STEERS QUALITY INCOME FUND	P	2011-01-11	2013-05-29
6 180 COHEN & STEERS QUALITY INCOME FUND	P	2011-01-11	2013-05-29
100 KAYNE ANDERSON MLP INVT	P	2010-12-10	2013-05-29
100 KAYNE ANDERSON MLP INVT	P	2010-12-10	2013-05-29

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

(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)
96 BK ONE CAP TR	P	2011-02-24	2013-05-29
156 EATON VANCE LTD DURATION FD	P	2010-09-01	2013-05-29
200 EATON VANCE LTD DURATION FD	P	2010-09-01	2013-05-29
144 EATON VANCE LTD DURATION FD	P	2010-09-01	2013-05-29
3 528 EATON VANCE LTD DURATION FD	P	2010-09-20	2013-05-29
3 551 EATON VANCE LTD DURATION FD	P	2010-10-19	2013-05-29
3 684 EATON VANCE LTD DURATION FD	P	2010-11-18	2013-05-29
3 704 EATON VANCE LTD DURATION FD	P	2010-12-20	2013-05-29
0 467 EATON VANCE LTD DURATION FD	P	2010-12-20	2013-05-29
200 EATON VANCE LTD DURATION FD	P	2011-01-11	2013-05-29
244 EATON VANCE LTD DURATION FD	P	2011-01-11	2013-05-29
42 EATON VANCE LTD DURATION FD	P	2011-01-11	2013-05-29
1000 NUVEEN FLTG RATE INCM	P	2011-02-24	2013-06-03
100 JP MORGAN CHASE & CO	P	2011-02-24	2013-06-05
400 JP MORGAN CHASE & CO	P	2011-02-24	2013-06-05
500 BANK OF AMERICA 7 25	P	2010-08-16	2013-08-01
500 BANK OF AMERICA 7 25	P	2011-01-11	2013-08-01
500 JP MORGAN CHASE & CO	P	2010-06-25	2013-09-03
1000 NATIONAL TECHNICAL SYS	P	2012-10-10	2013-09-16
100 NATIONAL TECHNICAL SYS	P	2013-08-15	2013-09-16
1900 NATIONAL TECHNICAL SYS	P	2013-08-15	2013-09-16
400 HATTERAS FINANCIAL CORP	P	2010-12-10	2013-11-19
300 HATTERAS FINANCIAL CORP	P	2011-01-11	2013-11-19
200 HATTERAS FINANCIAL CORP	P	2011-01-11	2013-11-19
100 HATTERAS FINANCIAL CORP	P	2010-12-10	2013-11-19
300 HATTERAS FINANCIAL CORP	P	2013-08-14	2013-11-19
700 HATTERAS FINANCIAL CORP	P	2013-08-14	2013-11-19
1000 HATTERAS FINANCIAL CORP	P	2013-09-06	2013-11-19
84 147 HATTERAS FINANCIAL CORP	P	2013-10-28	2013-11-19
1000 CYS INVESTMENTS INC	P	2011-02-24	2013-11-20

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

(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)
1000 CYS INVESTMENTS INC	P	2013-08-14	2013-11-20
80 952 CYS INVESTMENTS INC	P	2013-10-17	2013-11-20
200 ANNALY CAPITAL MGMT REIT	P	2010-12-10	2013-11-25
800 ANNALY CAPITAL MGMT REIT	P	2011-01-11	2013-11-25
1000 ANNALY CAPITAL MGMT REIT	P	2013-08-14	2013-11-25
59 395 ANNALY CAPITAL MGMT REIT	P	2013-11-01	2013-11-25

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

(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)
51,215		50,075	1,140
2,118		2,083	35
17,439		17,659	-220
17,439		17,419	20
25,000		24,325	675
2,500		2,354	146
25,000		24,730	270
100,000		100,593	-593
47,816		49,205	-1,389
58,437		64,512	-6,075
65,007		66,736	-1,729
51,329		49,228	2,101
64,334		63,940	394
33,655		34,186	-531
68,010		59,245	8,765
37,942		33,573	4,369
115,487		96,585	18,902
27,356		23,319	4,037
53,906		53,519	387
12,500		10,984	1,516
12,500		10,734	1,766
12,500		10,659	1,841
7,887		7,344	543
6,938		6,139	799
1,242		907	335
2,484		1,814	670
8,618		6,094	2,524
77		54	23
3,701		2,820	881
3,704		2,820	884

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

(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)
2,400		2,442	-42
2,621		2,540	81
3,360		3,257	103
2,419		2,345	74
59		58	1
60		58	2
62		59	3
62		59	3
8		7	1
3,360		3,147	213
4,100		3,839	261
706		661	45
12,696		12,519	177
2,591		2,570	21
10,370		10,279	91
12,500		12,009	491
12,500		12,499	1
12,500		13,459	-959
22,841		7,419	15,422
2,283		1,602	681
43,398		30,446	12,952
6,759		12,654	-5,895
5,069		8,732	-3,663
3,380		5,822	-2,442
1,690		3,163	-1,473
5,063		5,762	-699
11,814		13,445	-1,631
16,878		17,759	-881
1,420		1,650	-230
8,006		12,611	-4,605

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

(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)
8,006		7,889	117
648		680	-32
2,000		3,645	-1,645
7,998		14,161	-6,163
9,997		12,009	-2,012
594		700	-106

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	
			1,140
			35
			-220
			20
			675
			146
			270
			-593
			-1,389
			-6,075
			-1,729
			2,101
			394
			-531
			8,765
			4,369
			18,902
			4,037
			387
			1,516
			1,766
			1,841
			543
			799
			335
			670
			2,524
			23
			881
			884

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	
			-42
			81
			103
			74
			1
			2
			3
			3
			1
			213
			261
			45
			177
			21
			91
			491
			1
			-959
			15,422
			681
			12,952
			-5,895
			-3,663
			-2,442
			-1,473
			-699
			-1,631
			-881
			-230
			-4,605

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	
			117
			-32
			-1,645
			-6,163
			-2,012
			-106

Form 990PF Part XV Line 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*				
BETH MIDRASH MISHKAN ISRAEL PO BOX 5351 NO HOLLYWOOD,CA 91616	NONE	PUBLIC	GENERAL	3,600
AMERICAN FRIENDS OF ISRAEL ELWYN PO BOX 828284 PHILADELPHIA,PA 19182	NONE	PUBLIC	GENERAL	5,000
GIMMEL FOUNDATION 10 WEST 86TH ST NEW YORK,NY 10024	NONE	PUBLIC	GENERAL	20,000
ASHREINU 369 N FAIRFAX AVENUE LOS ANGELES,CA 90036	NONE	PUBLIC	GENERAL	5,000
ISRAEL SPECIAL KIDS FUND 505 8TH AVENUE NEW YORK,NY 10018	NONE	PUBLIC	GENERAL	10,000
JEWISH LIFE FOUNDATION 16501 VENTURA BLVD SUITE 504 ENCINO,CA 91436	NONE	PUBLIC	GENERAL	10,000
LOS ANGELES GROUP FOR THE BLIND OF 5460 WHITE OAK AVE ENCINO,CA 91316	NONE	PUBLIC	GENERAL	1,000
CHABAD HOUSE AT UCLA 612 1/2 MIDVALE AVENUE LOS ANGELES,CA 90024	NONE	PUBLIC	GENERAL	7,000
MAIMODES ACADEMY 310 NO HUNTLEY DRIVE LOS ANGELES,CA 90048	NONE	PUBLIC	GENERAL	10,000
KAHAL LEVY POBOX 4246 WEST HILLS,CA 91307	NONE	PUBLIC	GENERAL	10,000
CAMERA NATIONAL MEDIA RESOURCE CENT P O BOX 35040 BOSTON,MA 02135	NONE	PUBLIC	GENERAL	1,000
TORAT HAYIM HEBREW ACADEMY 1210 S LA CIENEGA BLVD LOS ANGELES,CA 90035	NONE	PUBLIC	GENERAL	12,000
AMERICAN FRIENDS OF DARCHIE BINAI 1049 EAST 13TH ST BROOKLYN,NY 11230	NONE	PUBLIC	GENERAL	1,500
SEPAHARDIC TEMPLE TIFERETH ISRAEL 10500 WILSHIRE BOULEVARD LOS ANGELES,CA 90024	NONE	PUBLIC	GENERAL	500
SEPHARDIC TRADITION RECREATION 6634 VALJEAN AVENUE VAN NUYS,CA 91406	NONE	PUBLIC	GENERAL	200,000
Total . . . . ▶ **3a**				421,600

Form 990PF Part XV Line 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*				
AMERICAN FRIENDS OF ESHEL 825 E 18TH STREET BROOKLYN, NY 11230	NONE	PUBLIC	GENERAL	5,000
AMERICAN FRIENDS OF KOLLEL RABBI EL P O BOX 50291 JERUSALEM IS	NONE	PUBLIC	GENERAL	1,800
WEST COAST TORAH CENTER 322 FOOTHILL RD BEVERLY HILLS, CA 90210	NONE	PUBLIC	GENERAL	5,000
FOUNDATION FOR JEWISH DIVERSITY 1880 CENTURY PARK EAST LOS ANGELES, CA 90067	NONE	PUBLIC	GENERAL	5,000
RABBINICAL SEMINARY OF AMERICA 7601 147TH ST FLUSHING, NY 11367	NONE	PUBLIC	GENERAL	5,000
BNAI ZION FOUNDATION 5862 LINDENHURST AVE LOS ANGELES, CA 90036	NONE	PUBLIC	GENERAL	1,000
GOSEPHARDIC 27 PILCHER ST STATEN ISLAND, NY 10314	NONE	PUBLIC	GENERAL	25,000
LIGHT OF ISRAEL 2115 EAST AVENUE ROCHESTER, NY 14610	NONE	PUBLIC	GENERAL	5,000
MACHON MAAYAN 3209 AVENUE L BROOKLYN, NY 11210	NONE	PUBLIC	GENERAL	1,500
BNOS CHIAM SEMINARY 235 HEARTH COURT WEST LAKE, NJ 08701	NONE	PUBLIC	GENERAL	1,500
FLAME P O BOX 590359 SAN FRANCISCO, CA 94159	NONE	PUBLIC	GENERAL	1,000
JERUSALEM ON LINE UNIVERSITY 105 EAST 34TH ST UNIT 117 NEW YORK, NY 10016	NONE	PUBLIC	GENERAL	10,000
AMERICAN FRIENDS OF BIRKAT KOHANIM 617 S OLIVE ST LOS ANGELES, CA 90014	NONE	PUBLIC	GENERAL	1,800
AMERICAN JEWISH COMMITTEE 9911 W PICO BLVD LOS ANGELES, CA 90035	NONE	PUBLIC	GENERAL	5,000
JEWISH UNITY NETWORK P O BOX 300369 BROOKLYN, NY 11230	NONE	PUBLIC	GENERAL	1,000
Total . . . . ▶ **3a**				421,600

Form 990PF Part XV Line 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*				
NACHLAT MEIR P O BOX 35040 BOSTON, MA 02135	NONE	PUBLIC	GENERAL	1,800
THE JEWISH NATIONAL FUND 2525 AMSTERDAM AVE NEW YORK, NY 10033	NONE	PUBLIC	GENERAL	500
DAVID HOROWITZ FREEDOM CENTER P O BOX 130707 HOUSTON, TX 77219	NONE	PUBLIC	GENERAL	7,500
HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG WASHINGTON, DC 20024	NONE	PUBLIC	GENERAL	1,000
LASHA 26500 W AGOURA RD CALABASAS, CA 91302	NONE	PUBLIC	GENERAL	1,000
MEMRI P O BOX 27837 WASHINGTON, DC 20077	NONE	PUBLIC	GENERAL	1,000
OHR CHANOCH HIGH SCHOOL 8906 WEST PICO BLVD LOS ANGELES, CA 90035	NONE	PUBLIC	GENERAL	2,600
SHEHEBAR SEPHARDIC CENTER 34 WEST 33RD ST NEW YROK, NY 10001	NONE	PUBLIC	GENERAL	5,000
YESHIVA HIGH SCHOOL 9717 1/2 WEST PICO BLVD LOS ANGELES, CA 90035	NONE	PUBLIC	GENERAL	25,000
YESHIVA UNIVERSITY 500 WEST 185TH ST NEW YORK, NY 10033	NONE	PUBLIC	GENERAL	5,000
Total . . . . ▶ **3a**				421,600

TY 2013 Accounting Fees Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 13000170

Software Version: 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	5,690	5,690	0	0

TY 2013 Investments Corporate Bonds Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 13000170

Software Version: 2013v3.1

Name of Bond	End of Year Book Value	End of Year Fair Market Value
1482 Micron Technology	49,954	32,233
21891 Blackrock Strategic Bond TST	100,517	87,345
25000 SLM Corp Medium Term 5.50%	25,000	24,866
4000 PIMCO DYNAMIC CR INCOME FD	100,000	89,920
100000 Wells Fargo & Co 4.625%	104,969	101,173
100000 Goldman Sachs Group 3.7%	100,720	104,129
100000 Morgan Stanley Call 5.75%	102,784	111,620
100000 Citigroup Inc 6.125%	104,467	115,271
4000 DOUBLE LINE OPPORTUNISTIC CR FD	100,000	89,280
5000 NUVEEN CREDIT STRATEGIES INCOME FD	45,203	48,650
4000 PIMCO DYNAMIC INCOME FUND	100,000	116,520
100000 CITY NAT CORP DEP SH	100,000	78,440
100000 BANK OF AMERICA CORP	100,000	96,000
100000 ARCH COAL INC	7,977	7,986
100000 COMMUNITY CHOIC	8,392	8,399
100000 KEMET CORPORATION	9,987	9,987

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TY 2013 Investments Corporate Stock Schedule

Name: HYMAN JEBB LEVY FOUNDATION
EIN: 23-7422872
Software ID: 13000170
Software Version: 2013v3.1

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2800 Coca-Cola Co	89,725	115,668
2132 Reynolds American Inc	15,003	106,579
1 BERKSHIRE HATHAWAY INC	37,811	177,900
1140 Hillman Gro Cap Tr Pfd (From Cl A)	32,739	34,656
500 JUNIPER NETWORKS	58,362	11,285
3500 NUVEEN FLOATING RATE INCOME FUND	46,593	41,720
1000 BAYER AKTIENGESELLSCHAFT	71,235	142,000
1019 FIRST TR/FOUR CORNERS	17,090	14,775
1029 PIONEER FLOATING RATE TRUST	18,647	13,089
1500 ZWEIG TOTAL RETURN FUND INC	27,240	20,910
1000 COUNTRYWIDE CAPITAL IV	19,035	24,890
1540.426 ALLIANCEBERNSTEIN GLOBAL	21,689	21,997
214.854 ALTRIA GROUP INC	5,240	8,248
1022.004 ARIES CAPITAL CORP	16,003	18,161
1000 PENN WEST ENERGY TRUST	16,663	8,360
2025.743 REYNOLDS AMERICAN	55,718	101,267
514.3356 KCAP FINL INC	3,561	4,151
1673 STARBUCKS CORP	89,782	131,146
680 ISHARES NASDAQ BIOTECH INDEX FD	81,580	154,401
911 POWERSHRS QQQ TRUST	54,600	80,132
692 SPDR S&P 500 EFT TR	99,420	127,805
1053 SPDR S&P MIDCAP 400 ETF	198,881	257,143
1901 ISHARES RUSSELL MIDCAP VALUE	96,840	124,915
1964 ISHARES RUSSELL 1000 VALUE	145,484	184,950
427.8932 KINDER MORGAN INC	16,388	15,404
2106.5016 SANDRIDGE MISSISSIPPIAN	36,984	19,485
640 KINDER MORGAN 17 WTS	1,459	2,598
328 ALEXION PHARMA INC	40,152	43,586
1542 ARM HOLDINGS PLC ADR	82,188	84,395
539 B/E AEROSPACE INC	37,750	46,909

Name of Stock	End of Year Book Value	End of Year Fair Market Value
93 CHIPOTLE MEXICAN GRILL	37,399	49,549
725 FACEBOOK INC	39,868	39,675
1161 GILEAD SCIENCES	79,081	87,191
38 GOOGLE INC	39,151	42,587
1160 HOMEAWAY INC	39,558	47,421
4339 FIRST TR DJ INTERNET FD	181,310	259,733
829 ISHARES RUSSELL 2000	67,121	82,485
2870 SPECTOR SPDR FINCL SELECT	49,258	62,738
1924 SPDR EURO ST XX	78,200	81,193
1469.7292 CORNERSTONE PROGRESSIVE RETURN	8,124	7,554
1058.7591 CORNERSTONE STRATEGIC VALUE	7,432	6,988
1060.6457 CORNERSTONE TOTAL RETURN	6,590	6,399
500 DELEK US HOLDINGS INC	13,759	17,205
100000 MONSANTO CO NEW	11,392	11,655
1000 PETROLOGISTICS	12,739	11,650
500 TJX COS INC	31,619	31,865
250 UNIVERSAL DISPLAY CORP	9,051	8,590
1000 YANZHOU COAL MNG CO	11,109	9,230
100 BUCKEYE PARTNERS	6,876	7,101
1000 NATIONAL RESOURCE PTNR	20,879	19,940
150 PLAINS ALL AMERN PPLN	7,846	7,765
2914.318 CORNERSTONE PROGRESSIVE RETURN	17,059	14,980
2895.13 CORNERSTONE STRATEGIC VALUE	20,137	19,108
2887.507 CORNERSTONE TOTAL RETURN	18,070	17,469
2818.312 CYS INVTS INC COM	31,758	20,884

TY 2013 Investments Government Obligations Schedule

Name:	HYMAN JEBB LEVY FOUNDATION
EIN:	23-7422872
Software ID:	13000170
Software Version:	2013v3.1
US Government Securities - End of Year Book Value:	
US Government Securities - End of Year Fair Market Value:	
State & Local Government Securities - End of Year Book Value:	100,000
State & Local Government Securities - End of Year Fair Market Value:	127,587

TY 2013 Other Assets Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 13000170

Software Version: 2013v3.1

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PASSOVER HAGGADAH BOOKS	163,100	163,100	163,100
Rounding	1	3	

TY 2013 Other Professional Fees Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 13000170

Software Version: 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	13,787	13,787	0	0

TY 2013 Taxes Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 13000170

Software Version: 2013v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD	1,006	1,006		
IRS - FYE 12/31/12	925			
IRS - FYE 12/31/13	2,468			